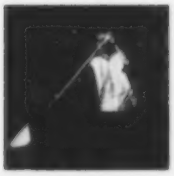
Ontario

ACTIVE2010

COMMUNITY PHYSICAL ACTIVITY PLANNING

A Resource Manual
for communities preparing plans



Ministry of Health Promotion

106-07435

A MESSAGE FROM THE HONOURABLE JIM WATSON, MINISTER OF HEALTH PROMOTION

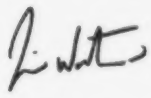
As Minister of Health Promotion, I am pleased to see the release of *Community Physical Activity Planning: A Resource Manual for Communities Preparing Plans*, which is a component of my ministry's *ACTIVE2010* strategy.

ACTIVE2010 is Ontario's sport and physical activity strategy. Developed in consultation with sport and recreation leaders from across the province, *ACTIVE2010* sets out an ambitious agenda. This element of that agenda is intended to assist communities in delivering quality local sport and physical activity programs. Local community planning is the cornerstone to successful program delivery.

Communities are in the best position to identify and respond to the needs of their citizens, especially when it comes to providing recreational services. By working together, public health officials, teachers, recreation leaders, coaches, parents and other interested volunteers will help build a strong sport and physical activity program at the community level.

Participation in sport and physical activity leads to an enhanced quality of life. As we move forward together to increase the health of all Ontarians, I am convinced physical activity and sport participation will play a key role in increasing Ontario's quality of life in the future.

I hope this manual is helpful, and I look forward to working with everyone in the sport and recreation sector in the future.



Jim Watson,
Minister

Ontario

TABLE OF CONTENTS

PART ONE: INTRODUCTION

Purpose Of This Manual 8

ACTIVE2010 8

Why Do We Need A Plan? 9

The Five Keys To A Successful Physical Activity Plan 11

Important Resources For Your Physical Activity Plan 14

PART TWO: THE PHYSICAL ACTIVITY PLAN

Preparing Your Physical Activity Plan 16

Stage One: Getting Started 20

Stage Two: Preparing The Plan 46

Stage Three: Measuring Success 54

PART THREE: RESOURCES

Case Studies: Physical Activity Campaigns 70

Public Consultation Techniques 78

Preparing Terms Of Reference For Physical Activity Plans 82

Literature Review: Factors Affecting The Success Of Program Interventions 88

Bibliography And Websites For Further Information 94

PART ONE: INTRODUCTION

PURPOSE OF THIS MANUAL

This manual will help your community create an action plan to promote physical activity. It can be used by a single organization, such as a municipal parks and recreation department. However, your physical activity plan will likely be most effective if it involves a wide range of organizations, such as the health unit, boards of education, YM/YWCAs and others concerned with physical activity and healthy communities. This manual has been written for a committee of community organizations that would collectively undertake a physical activity plan.

The resource manual has three parts:

Part One: Introduction

> Describes the need for physical activity plans in Ontario, the Provincial initiatives that will support these plans and the keys to a successful plan.

Part Two: The Physical Activity Plan

> Describes three stages in the planning process and a step-by-step approach to preparing a physical activity plan for your community.

Part Three: Resources

> Provides additional information and tools that will help you prepare your plan.

Ontario communities with different characteristics, objectives and resources will use this resource manual. It is a general guide. Your community can adapt the steps in the process and may not require all of the tools and resources that are included in the resource manual. The resource manual also describes a detailed and comprehensive planning process – how you use the manual will depend on the scale of your project.

ACTIVE2010[1]

ACTIVE2010 is a comprehensive strategy to increase participation in sport and physical activity throughout Ontario. It comprises the sport strategy and physical activity strategy which together address the development of amateur sport and initiatives to increase physical activity in Ontario.

The goals of *ACTIVE2010* are:

> To create opportunities for Ontarians to become involved in quality sport activities.
> To enhance opportunities for Ontarians to participate in daily physical activity.
> To increase the number of Ontarians who value and believe participation in sport and physical activity is an integral and essential part of life in Ontario.

[1] Excerpts taken from Ministry of Health Promotion, *ACTIVE2010 ONTARIO'S SPORT AND PHYSICAL ACTIVITY STRATEGY.*

The objectives of *ACTIVE2010* are:

> Increase physical activity from 48% to 55% by 2010.
> Implement the sport strategy in partnership with sector stakeholders.
> Enhance sport development leading up to the 2010 Olympics.
> Leverage government resources to strengthen the sport, physical activity and recreation sector.

Strategic approaches include:

> strengthening and building capacity among all sectors involved in delivery.
> removing barriers to, and creating supportive environments for, participation.
> promotion and education to increase awareness of the health benefits of physical activity and to motivate people to become more active.
> co-ordinating the efforts of all ministries involved in moving the plan forward.

Under the sport strategy, areas of action will focus on building and enhancing excellence, capacity, interaction and participation in sport. The physical activity strategy will act to enhance opportunities for physical activity at the community level through locally-initiated plans that target under-serviced populations, and support the provision of safe and affordable activity environments.

To make *ACTIVE2010* a success, the Ontario government is investing $5 million a year to improve awareness of the benefits of physical activity and motivate people to get active – boosting total funding for the sport and recreation sector to more than $20 million annually.

WHY DO WE NEED A PLAN?

The health benefits of physical activity are now well known. As little as 30 minutes of physical activity on most days of the week promotes better health and prevents illness. For the most part, however, Ontarians do not engage in sufficient physical activity to enjoy the health benefits. Recent statistics indicate that:

> Only 48% of Ontario adults are physically active. (CFLRI, 2004);
> In 2003, almost 50% of Ontario adults were overweight or obese (2004 Chief Medical Officer of Heatlh Report);
> Only 21% of Canadian children are accumulating enough daily exercise to meet internation guidelines for optimal growth and development (CFLRI, 2005);
> 56% of youth between the ages of 12 and 19 are inactive (CCHS, 2000/01), and many children stop participating in sports when they enter their teens; and
> Men are more likely than women to be active and teenage boys are twice as likely as teenage girls to meet the international guideline for optimal growth and development (CFLRI, 2004).

The current and future implications of these patterns of inactivity include:

> 15% of Ontario adults over the age of 18 are obese, and 33% are overweight. (Statistics Canada, 2003);
> The number of overweight children in Canada has doubled, and the number of obese children has tripled, in the past 15 years (Tremblay & Willms, 2000);
> The effects of inactive living cost the Ontario health care system $1.8 billion every year. (Katzmarzyk, 2003).

On the positive side, however, there is reason to believe that Ontarians will respond to a physical activity plan:

> 52% of Ontario adults age 15 years and older fully intend to be active (2002 Physical Activity Monitor);
> 49% of Ontario adults age 15 years and older are very confident that they can achieve 30 minutes of moderate-intensity activity every other day (2002 Physical Activity Monitor);
> 65% of Ontario adults believe they have moderate to complete control over the choice to be active (2002 Physical Activity Monitor);
> 46% of Canadian children ages 6 to 17 years really enjoy physical education classes (2002 Physical Activity Monitor); and
> 52% of children (6-17) receive enough physical activity through physical education classes (2002 Physical Activity Monitor).

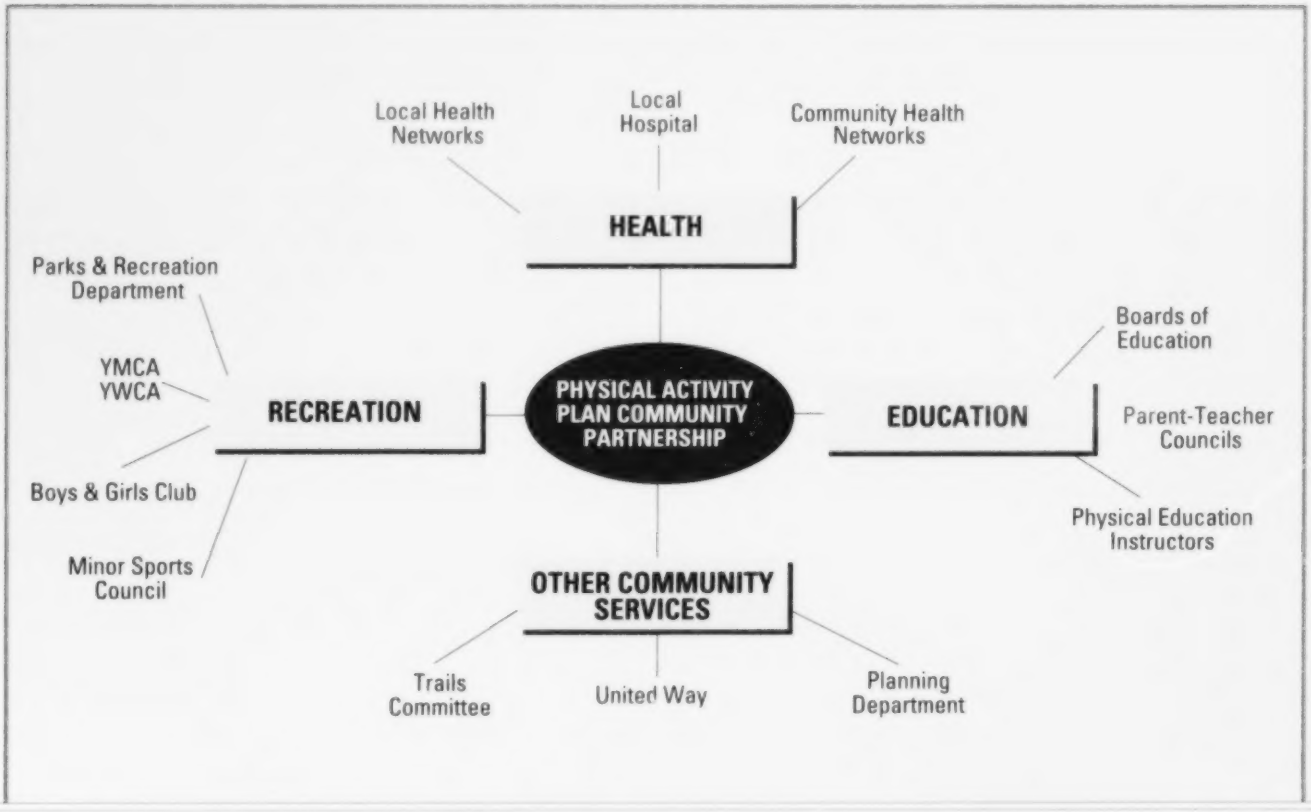
The challenge for physical activity planning, therefore, is to translate the beliefs and intentions of Ontarians into action – to provide the support and encouragement needed to create physically-active communities.

THE FIVE KEYS TO A SUCCESSFUL PHYSICAL ACTIVITY PLAN

There is no single model for a physical activity plan. The plan in your community may be very different from those adopted by your neighbours. This resource manual will take you through a number of steps in the planning process – but the product will be determined in your community by your planning committee. Nonetheless, successful physical activity plans will share a number of characteristics. Five keys to success are a part of the planning process outlined in this resource manual.

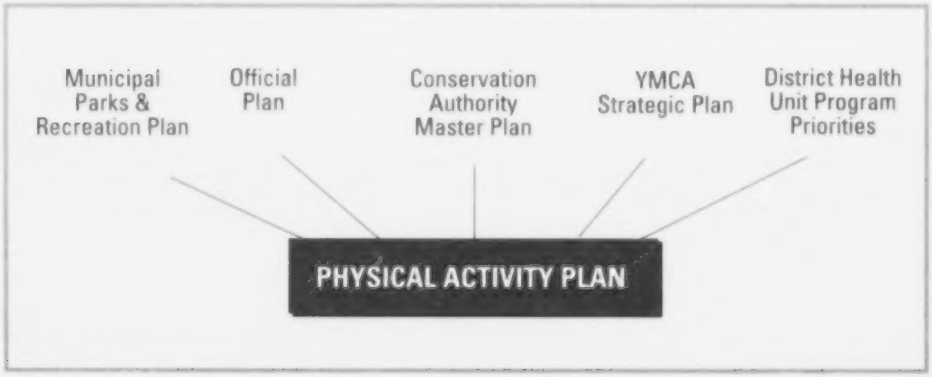
KEY TO SUCCESS #1: A Collaborative Community Partnership

Promoting physical activity and healthy communities is an objective shared by many organizations in your community representing the recreation, education, and health sectors. Your plan will be most successful if it takes full advantage of the resources, skills and expertise of all community partners. Of course, to accomplish this, you must establish an effective working relationship and adopt a collaborative approach to the planning process. Sharing resources and jointly planning and delivering programs is often difficult, particularly if this involves new ways of doing things or changes to established policies and procedures. A broad-based community partnership may be difficult to establish but it can lead to a much more effective plan.



KEY TO SUCCESS #2: Linking the Physical Activity Plan to Other Community Plans

Your physical activity plan will establish community-wide goals for improving physical activity and promoting healthy lifestyles. The community partners responsible for the physical activity plan will share these goals. Together, the partners may introduce some new programs or services that achieve these goals. However, these goals must also be consistent with and supported by other plans or strategies adopted by the community partners. Your municipality may have a parks and recreation master plan and official plan – both of which address programs and facilities that can contribute to active living. Your YMCA may have a strategic plan or a business plan that establishes future programs and priorities. Your local health unit may have identified program priorities. The physical activity plan should be closely tied to these individual plans of each community partner. This will ensure that in all respects the future plans of community partners contribute to the broad goals set out in the physical activity plan.



KEY TO SUCCESS # 3: Clearly Stated and Achievable Purpose and Outcomes

No plan can be successful if the purpose and anticipated outcomes are not known. When a number of community partners are collaborating, the need for a clearly stated purpose and outcomes is all the more important. The committee responsible for your physical activity plan will have representatives from a variety of organizations – each of which has its own mission and organizational goals and priorities. These will be compatible and complementary, but they will not be the same. Your committee must therefore define its purpose and what it hopes to achieve in a way that all of the community partners can accept and embrace.

Finally, however you propose to improve physical activity in your community, your objectives must be realistic. It is important to set targets that can be achieved in the timeframe and with the resources available to you.

KEY TO SUCCESS # 4: Evaluating Your Progress

Planning is an ongoing activity. The planning process described here assumes that you will evaluate your success, make improvements, and continue to introduce programs and services that will improve physical activity levels. Evaluation is therefore a critical part of the planning process. By carefully monitoring changes in physical activity patterns in your community or other identified indicators, you can make annual improvements.

KEY TO SUCCESS # 5: A Long Term Perspective

Most plans will start small and build upon accomplishments over time. There are many initiatives that could be introduced in your community to improve physical activity levels. Some of these – such as a new program for school age children – might be possible to implement immediately with the resources and skills of the community partners. However, other projects may take longer to put in place. If part of your physical activity plan involves improvements to recreation facilities in your community, such as the expansion of walking trails, it may take some time to complete the design and assemble the funds to implement the project. Similarly, revising long standing policies governing such things as community use of schools may take some time – but these may be seen as critical components of a successful physical activity plan in your community.

Planning, as noted above, is an ongoing activity and you may constantly be updating your physical activity plan. However, for the purposes of setting priorities and determining what to tackle in the short and long term, you probably should adopt a five-year planning horizon. Your plan can then decide what can realistically be accomplished in each of the first five years of implementation. While you will probably adjust your implementation plan over time, adopting a five-year perspective is an appropriate and realistic approach.

IMPORTANT RESOURCES FOR YOUR PHYSICAL ACTIVITY PLAN

Throughout the resource manual, there are references to information sources, websites and articles that may be of interest to you. The following are a few important resources to check out before you start your planning process.

ACTIVE2010

http://www.active2010.ca

Information on the *ACTIVE2010* program.

Communities in Action Fund

www.mhp.gov.on.ca/english/sportandrec/fund.asp

Background information and grant application forms for the Ministry of Health Promotion Community Action Fund.

Go for Green

http://www.goforgreen.ca

Background on the national program that links active living, health and environmental objectives. The Go for Green Shopping Cart (https://secure.goneeshopping.com/gfgEshop/greenshop/index.aro) includes many resources that can be used in your community to promote active lifestyles. "How To" manuals on such things as walking/cycling, school bus programs and useful studies dealing with trails, gardening, and outdoor recreational resources are found at this location.

Canadian Community Health Survey – Physical Activity

http://www.statcan.ca/english/freepub/82-221-XIE/00604/nonmed/behaviours3.htm

Statistics Canada survey data monitoring the health of Canadians.

PART TWO: THE PHYSICAL ACTIVITY PLAN

PREPARING YOUR PHYSICAL ACTIVITY PLAN

Overview – Community Physical Activity Plans – The Planning Process

Figure One describes a process in three stages for preparing your physical activity plan.

The planning process involves three simple stages:

Stage One: Getting Started

Compiling information in your community and making the choices necessary to define the scope and purpose of your plan;

Stage Two: Preparing the Plan

Identifying the specific action plans to promote physical activity that will work best in your community;

Stage Three: Monitoring Success

Determining if your plan is meeting its objectives and making changes as warranted.

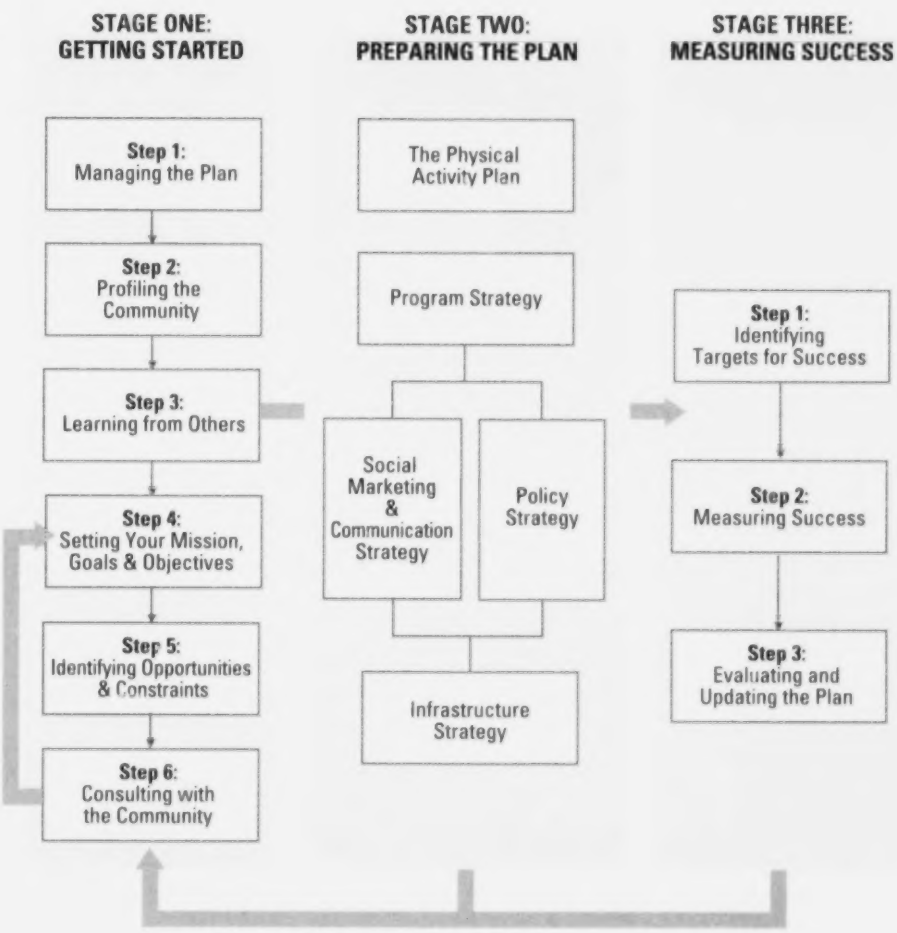
This description of the planning process is a general guide for your committee. It describes important tasks in a typical sequence. It will help the committee work through the process of preparing a plan – but you may wish to adapt the process to better suit the scope of your planning process or the circumstances in your community.

In Stages One and Three of the planning process, the identified steps happen in sequence. In Stage Two, four different but related strategies are identified. You would investigate these simultaneously, but they will likely have different priorities for implementation.

There are two important **feedback loops** in the planning process. In Stage One, the committee will set goals and objectives for the plan (Step 4) but may refine these based on additional research and input from the community (Steps 5 and 6). Stage Three of the planning process is the formal evaluation of the plan and the results are used to make improvements for subsequent years.

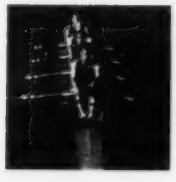
Each stage in the planning process is described in detail in the discussion that follows.

FIGURE ONE:
COMMUNITY PHYSICAL ACTIVITY PLAN
THE PLANNING PROCESS



PART TWO: THE PHYSICAL ACTIVITY PLAN

Stage One:
Getting Started



1 STAGE ONE: GETTING STARTED

FIGURE TWO:

STAGE ONE: GETTING STARTED

- **Step 1:** Managing the Plan
- **Step 2:** Profiling the Community
- **Step 3:** Learning from Others
- **Step 4:** Setting Your Mission, Goals & Objectives
- **Step 5:** Identifying Opportunities & Constraints
- **Step 6:** Consulting with the Community

The six steps in Stage One of the planning process are outlined in Figure Two. These will create a solid foundation for your physical activity plan. While many committees want to move quickly to the production of an action plan – these first steps are necessary to ensure success.

Step One addresses a number of critical questions associated with the management of the planning process and ensures that you have assembled an effective team and adopted a workable approach for the plan.

In Steps Two through Six, you will collect the information necessary for your committee to make decisions about the type of physical activity plan that will work best in your community.

1 *STAGE ONE:* **STEP ONE:** MANAGING THE PLAN

OBJECTIVES

- to create the team that will manage the plan
- to identify the individuals and organizations in your community that will be a part of the planning process
- to determine the resources available and required to do the plan

Discussion

Creating a management structure for the physical activity plan is an important first step. The plan will be most successful if a number of community organizations are involved and these community partners must be recruited. The plan must be managed on a day-to-day basis and you will need to establish a committee for this purpose. Depending on the scope of the plan, you may require a variety of committees with different functions. At this stage you will also determine who will do the work involved in preparing the plan. The resources you require will depend on the extent to which your planning process is undertaken by volunteers, staff recruited from community agencies, contract staff retained for the job or consultants.

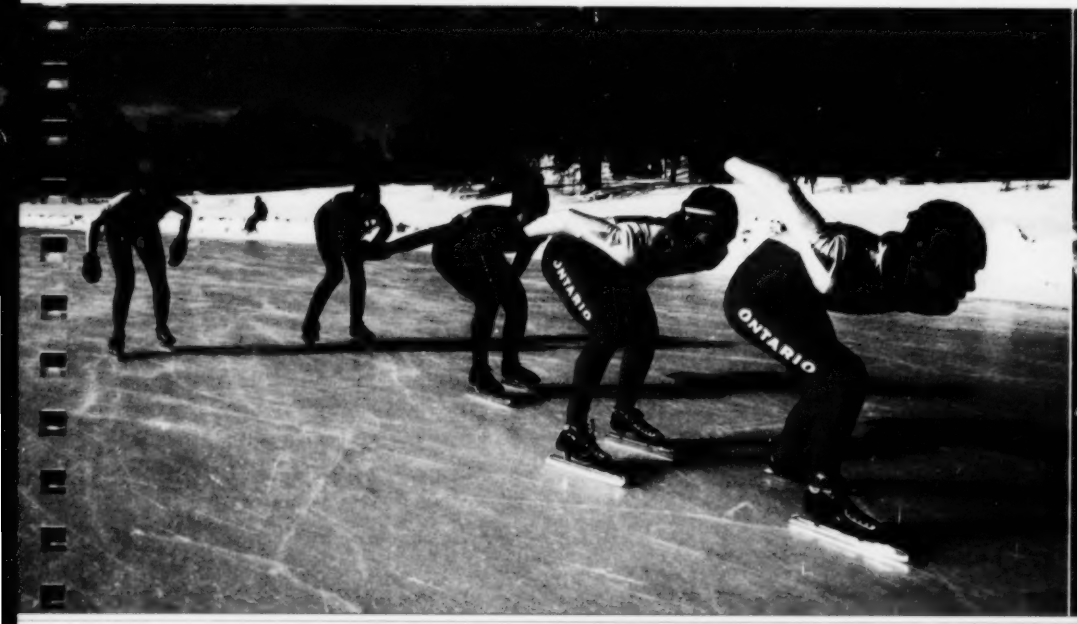
Resources

The following resources are available to assist you with this step in the planning process:

- Toolkit 1:1A – Identifying Potential Community Partners for the Physical Activity Plan (Page 24)
- Preparing Terms of Reference for Physical Activity Plans (Part Three of the manual)
- Toolkit 1:1B – A Checklist: Characteristics of Committee Members (Page 25)

Outcomes and Next Steps

At the end of Step One you will have a steering committee in place, timelines and resources confirmed, and staff or consultants hired to assist with the plan.



QUESTIONS

What is a reasonable timetable for doing the plan?

Who are the possible community partners for the physical activity plan?

What is the role of the planning committee?

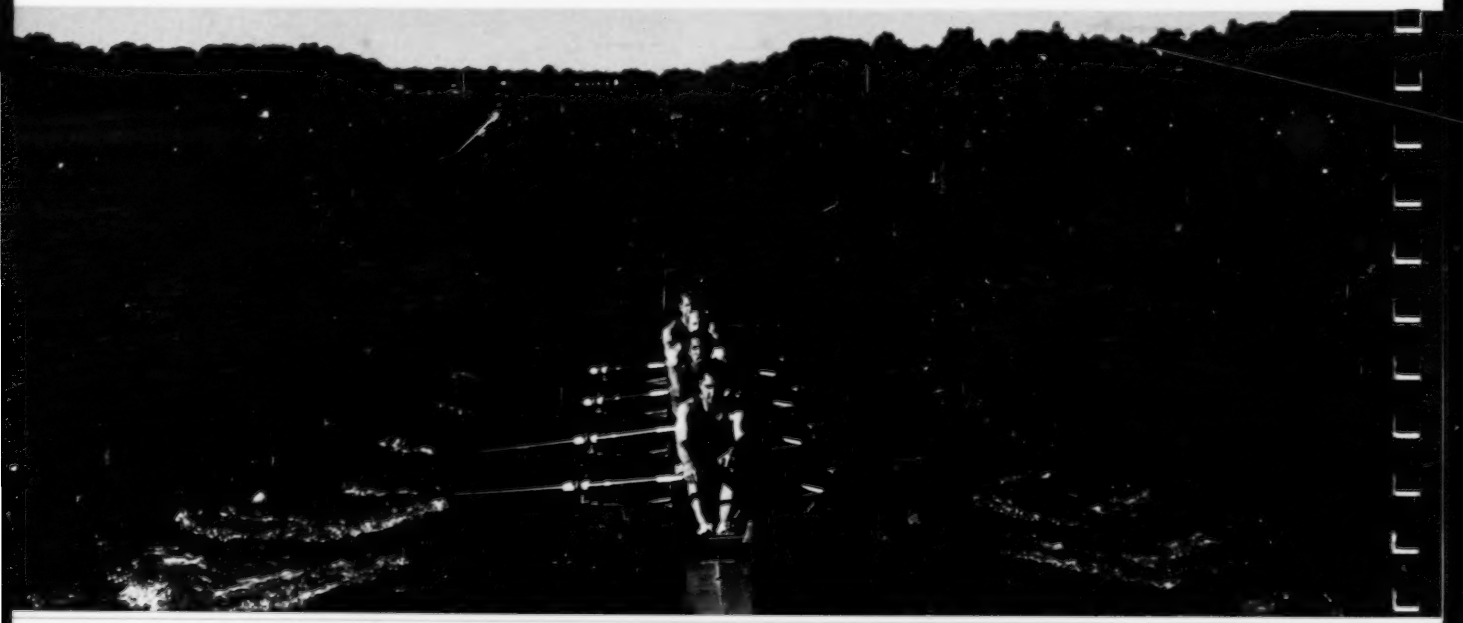
1 *STAGE ONE:* **STEP ONE:** THE KEY QUESTIONS

Considerations

Ultimately this will depend on the scope of the plan and the resources that you have at your command. A critical issue is whether the work will largely be done by the planning committee or by staff or consultants retained for this purpose. Another important consideration affecting timing will be the amount of community consultation that is contemplated. These considerations should be balanced against reasonable timeframes to complete the necessary work and the need to get on with implementation. As a general guideline – 12 months would be a generous timeframe in most communities and 4 months would likely be the minimum if the work was being done by paid staff or consultants.

Many organizations in your community can embrace the objective and make a significant contribution to improved physical activity. Further, the success of your plan and its implementation will depend on the partners involved. You should explore a wide range of possible partners with a keen interest in the contribution they can make to the plan. Toolkit 1:1A "Identifying Potential Community Partners for the Physical Activity Plan" will be helpful.

The planning committee is ultimately responsible for preparing the physical activity plan. It should represent the key partners with an interest in the plan, resources to contribute and responsibilities for implementation. The committee will oversee the individuals responsible for compiling information and identifying projects. The committee will make decisions on projects and priorities represented in the plan. Perhaps most importantly, the committee will be the plan's champion – promoting it to the community and the decision-makers that must support its implementation. Of course, the *individuals* represented on the committee are extremely important. See Toolkit 1:1B for "A Checklist of Committee Member Characteristics".



Will we hire outside help to work on the plan?

This of course depends in part on the resources you have available for the plan. As this resource manual demonstrates, there is a good deal to be done to prepare an effective plan. Your committee has three broad options in this regard, all of which are acceptable but have different implications for resources and the role of the committee:

> Rely on volunteers and "in-kind" services from community agencies – this requires the least resources but places pressure on members of the committee and other volunteers to do the work. Furthermore, all required skills and expertise must be represented in your volunteer workforce.
> Hire staff on contract to work under the direct supervision of the committee – this is a compromise with some of the drawbacks of the volunteer model but staff relieve the volunteers of some responsibilities.
> Hire a consultant to prepare the plan under the supervision and with the approval of the committee – this allows the community partners on the committee to control the product without doing the work, however, it demands the most resources.

If a consultant is retained, you will need Terms of Reference. Direction on preparing Terms of Reference is available in the resources section of the manual.

What is the relationship between the physical activity plan and other planning projects in our community?

This is a critical question. You don't want to duplicate work that has already been done by others or "reinvent the wheel" by recommending actions that have already been adopted and are being pursued by others in your community. It is important therefore to review recently completed plans and understand what others are doing or plan to do. The committee should canvass other public agencies and community interests to identify complementary planning activities. For example:

> Your Parks and Recreation Department or local YMCA may have done a master plan or strategic plan. These will not only have useful information on community needs; they will indicate priorities and plans to provide resources that can contribute to physical activity
> Your local Board of Health or Social Planning Council may have compiled research or planned programs to address specific problems associated with physical inactivity.
> Your local Board of Education or another service provider may have consulted with sectors of the community, such as youth, on issues related to the physical activity plan.
> Your Planning Department will regularly compile socio-demographic information and community profiles that will be of value in the planning process.

Other planning projects recently completed, underway, or planned will at minimum provide information for the physical activity plan and may provide opportunities to share tasks and resources and coordinate recommendations in a manner that benefits all parties.

TOOLKIT 1:1A

Identifying Potential Community Partners for the Physical Activity Plan

Use the following chart to identify possible partners for the planning process. Consider all sectors of your community and attempt to achieve a good cross-section of interests. In selecting organizations to be represented on the committee, focus on those with a significant role in the plan's implementation and with resources to contribute to the planning process. Resources may be financial but also include expertise, credibility, contacts in the community, control of facilities that can be used in your plan, etc. Of course, ultimately, your success depends on the individuals represented on your committee. (See Toolkit 1:1B)

Sector	Organization	Possible Contribution (Expertise, Resources, Credibility, Implementation Responsibility)	Potential Committee Member
Health			
Education			
Recreation			
Government			
Business			
Others			

TOOLKIT 1:1B

A Checklist: Characteristics of Committee Members

The following are some of the characteristics of a good committee member. It is unlikely that any one individual will have all of these characteristics; but hopefully they will be represented by the membership of the committee.

Characteristics

- ☐ Has responsibility for resources (facilities, programs, staff, etc.) that may be used in the plan
- ☐ Is in a position of authority to influence the plan's implementation
- ☐ Is recognized and respected among the partners responsible for the plan
- ☐ Can act as a credible and persuasive champion for the plan in the community and in decision-making forums
- ☐ Brings relevant experience or expertise with the planning process to the committee
- ☐ Can commit the time to the planning process
- ☐ Will work effectively as a member of a team managing the planning process
- ☐ Has a strong knowledge of the community
- ☐ Is well connected in the community and can reach out to organizations not represented on the committee

OBJECTIVES

- to describe current physical activity patterns and health indicators in your community
- to describe characteristics of the residents that may influence the plan
- to identify other community characteristics that may be important in the planning process

1 *STAGE ONE:* **STEP TWO:** PROFILING THE COMMUNITY

Discussion

A detailed community profile is a critical part of your physical activity plan. Understanding current levels of physical activity and the possible health impacts provides a baseline against which to monitor your success. This is also important information for your communication and social marketing efforts. You will also want to tailor your plan to the unique characteristics of your community. A profile of the age, family structure, ethnicity and income of residents will help to identify potential target groups and effective intervention strategies. Other characteristics may also be relevant to your planning. For example, do white collar, sedentary occupations dominant the employment structure? Does the climate suggest that indoor facilities will be an important determinant of physical activity? Preparing a community profile will ensure your plan will be effective in your community.

Resources

Physical Activity and Health Indicators
Data sources are outlined in Part Three of the manual. The CFLRI website (www.cflri.ca) is a very valuable resource.

Socio-demographic Profile
Statistics Canada information is the best indicator of the demographic profile, unfortunately if can be dated. Your local planning department should be able to provide you with the most up-to-date information available, including projections of how your population may change in the future.

Other Community Characteristics
Other relevant characteristics may be documented in planning or research studies done in your community. These will likely be known to committee members but also can be identified through the local library or community information centre.

Outcomes and Next Steps

At the end of Step Two you will have a good understanding of the existing conditions in your community.

1 *STAGE ONE:* **STEP TWO:** THE KEY QUESTIONS

Considerations

The resources listed previously will allow you to compile a comprehensive profile of key health and physical activity indicators in your community. Most significant in this regard are indicators of levels of physical activity sufficient for a healthy lifestyle. Specific measures for physical inactivity, obesity, and health problems may be available. Ideally, you will select measures that are collected on an ongoing basis so you can monitor changes over time in your community.

The family structure, employment characteristics, age, ethnicity and income profile of your community provides a general overview that will be relevant to most plans. You will also want to compile specific information pertaining to key sectors of your community if you anticipate they may be a focus of the plan. The Ministry has identified the following possible target groups:

- Children
- Youth
- Aboriginal people
- Older adults
- Low income families
- Ontarians with disabilities
- Visible/ethnic minorities
- Women and girls

The date for which this information is available will be a problem. The five-year census is often out of date. In addition, while your local planning department should be able to tell you how the overall population in your community will change in the next ten years or so – few can tell you how the age, ethnicity, income or employment structure will change. The committee may have to make assumptions in this regard.

Your physical activity plan will change attitudes and behaviours and in so doing create a more active and healthy lifestyle in your community. The plan is about lifestyle and as such your community's current lifestyle is relevant to the profile. Your committee will understand the local community and its lifestyle and their observations are an important part of the profile. For example, you may wish to discuss and document your views on:

- What factors are affecting children's participation in active sports, including changes in school physical education programs, expanded free time pursuits that are not active, etc.?
- Have local recreation facilities been lost or volunteer sport organizations been disbanded?
- Have family lifestyles changed in ways that restrict active participation due to more working parents, single-parent households, changing childcare responsibilities, etc.?
- How is the social or ethnic character of the community changing in ways that may affect active living?
- Are attitudes toward healthy lifestyles and active living changing in your community?

QUESTIONS

What are the key indicators of physical activity and health that might be compiled for our community?

Does the profile information have any purpose other than describing the community for the purpose of preparing a plan?

What social and demographic characteristics of the community might be relevant to our physical activity plan?

In addition to hard data from the census or other sources, what other characteristics of the community might be included in the profile?

In Stage Three of the planning process you will measure the success of your plan. To do this, you will want to demonstrate positive changes in levels of physical activity and hopefully attribute these to your plan. The community profile is your baseline – or the description of the situation before the plan was implemented. It is against this baseline that you will measure changes to judge the success of your plan. It is important therefore that you carefully consider the full range of baseline information that you want to have in place for the purposes of plan evaluation.

OBJECTIVES

- to review the experience of other communities who have introduced successful physical activity plans
- to consider factors that affect the success of physical activity strategies

1 *STAGE ONE:* **STEP THREE:** LEARNING FROM OTHERS

Discussion

A number of communities have prepared plans and mounted successful physical activity campaigns. There is also a good deal of research evaluating these projects. While your plan must reflect your community – and the steps in this planning process will ensure that it does - there are likely useful lessons to learn from the experience of others.

Resources

- **Case Studies: Physical Activity Campaigns.** Case studies of selected physical activity programs in municipalities in Canada and elsewhere.
- **Literature Review: Factors Affecting Intervention Programs:** A review of the research on the relative effectiveness of different intervention strategies in different sectors.
- A **bibliography** and a listing of websites that can provide additional information of interest.

Outcomes and Next Steps

At the end of Step Three, you have created your management structure for the plan, profiled the community and reviewed the relevant experience of other communities.

1 *STAGE ONE:* **STEP THREE:** THE KEY QUESTIONS

Considerations

There is a great deal of information on physical activity and health related considerations and some of this may be helpful as you prepare your plan. This information is found in the Resources section of the manual and addresses:

- *Canadian and international research data on physical activity patterns, barriers to physical activity, and factors affecting physical activity* - this information is relevant to any strategy to expand physical activity and will be particularly useful if you do not have recent, comparable data from your community.
- *Academic research on the relative effectiveness of intervention strategies* – while potentially relevant when you select strategies for your community, it has a research rather than implementation focus. The results are briefly summarized in the Resources section of the manual.
- *Research on the health affects of physical inactivity* – this information is extensive and only selected references are included in the bibliography. Of course these research findings are a given from your perspective – your decision to prepare the plan is rooted in your appreciation of the dangers of physical inactivity. Selected findings from this literature are reprinted in the resource manual's introduction. You may wish to compile additional data to use in your social marketing or communications campaign.

Ontario has just started preparing physical activity plans, and there are few examples of comprehensive plans that conform to the process described in this resource manual. There are, however, examples of programs designed to promote physical activity.

The Resources section of the manual includes brief descriptions of selected physical activity programs undertaken in other communities. Sources for additional information are also listed.

While it is always possible to learn from the experience of others, your physical activity plan must be designed for your community. By following the steps in this planning process, your committee can better understand local barriers to physical activity and design a strategy that will work in your community.

QUESTIONS

What are the key indicators of physical activity and health that might be compiled for our community?

What might we learn from successful physical activity plans in other communities?

OBJECTIVES

- to document what you hope to accomplish with the plan
- to describe how you will go about achieving what you hope to accomplish
- to identify who in the community will be the focus of the plan
- to identify factors that will indicate the success of the plan and the timeframe within which these should be realized

1 *STAGE ONE:* **STEP FOUR:** SETTING YOUR MISSION, GOALS AND OBJECTIVES

Discussion

Your physical activity plan will reflect the needs in your community – as indicated by your profile – and the resources available for implementing the plan. Most communities will make choices and focus available human and financial resources in priority areas. To do this the committee must define a Mission and set Goals and Objectives.

Your Mission is a very brief, concise statement that describes the over-riding purpose of the committee and consequently the physical activity plan.

Goals are broad statements that describe what must be accomplished to achieve your Mission. These should be attainable and realistic.

Objectives are developed for each Goal and describe specific end results in a manner that can be measured and have a defined timeframe.

Resources

Tools are provided to assist your committee with formulating a Mission, Goals and Objectives. These tools are:

> Toolkit 1:4A – Writing a Mission Statement (Page 32)
> Toolkit 1:4B – Identifying Goals and Objectives for your Plan (Page 33)

Outcomes and Next Steps

At the conclusion of Step 4, you will have clearly stated the Goals and Objectives for your plan. The focus will have been narrowed to something that is both manageable with the resources available to your committee and relevant given the specific circumstances in your community. You are now ready to gather additional information consistent with the focus of the plan. This information will help you better understand opportunities and constraints affecting physical activity in your community and options for addressing these.

1 *STAGE ONE:* **STEP FOUR:** THE KEY QUESTIONS

Considerations

Your Mission, Goals and Objectives can help you focus on both what is possible and most important to promote physical activity in your community. Defining your Mission, Goals and Objectives at this point can guide your initial assessment of opportunities and constraints and consultations with the public in Steps 5 and 6 that follow. You can then revisit your Mission, Goals and Objectives and refine them if necessary before preparing your plan.

Your Mission, Goals and Objectives define what you hope to accomplish. The success of your plan will be evaluated against the Mission, Goals and Objectives. The community will understand the focus and purpose of your plan based on these statements and consequently decide if they support your efforts. Clearly adopting an appropriate Mission, Goals and Objectives are a critical step in the planning process.

Your Mission, Goals and Objectives are appropriate if they are:

> Relevant – based on the particular needs and unique lifestyle of your community
> Realistic – achievable with the resources available and within the timeframe allocated to the plan
> Measurable – anticipated accomplishments clearly enough stated to determine the success of your plan
> Engaging – enthusiastically embraced and actively supported by the community

Toolkit 1:4A and Toolkit 1:4B provide examples and defines the important characteristics of these guiding statements of your physical activity plan.

QUESTIONS

Why do we need to prepare a Mission, Goals and Objectives at this stage of the planning process?

How can we be sure that we have adopted an appropriate Mission, Goals and Objectives?

TOOLKIT 1:4A

Writing a Mission Statement

Use this form to draft a Mission Statement. Test and refine your draft Mission Statement by applying the guidelines noted under key considerations.

Mission Statement

Example: To provide information, motivation and opportunities to ensure all community residents improve their health through physical activity

Draft a Mission Statement for Your Committee:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Key Considerations

1. Your Mission should define:
   - > *What* your committee hopes to accomplish
   - > *Who* you intend to influence
   - > *How* you intend to do it

2. The statement should be concise [one or two sentence(s)] and challenging. It is your committee's reason for being and commitment to the community.

3. Your Mission cannot be so broadly stated or vague that it is meaningless; yet, it should not restrict your flexibility. The sample statement specifies three broad initiatives to explain what the committee will do (information, motivation, opportunities) and sets a general target by indicating that physical activity must lead to improved health.

4. The Mission should provide enough flexibility to allow the committee to creatively explore options to improve physical activity. It should not be constraining.

5. The statement should embrace the objectives or intent of all partners to the plan.

6. The Mission must be challenging but also realistic.

TOOLKIT 1:4B

Identifying Goals and Objectives for Your Plan

Use this form to identify Goals and Objectives for your plan. Consider the examples and ensure that your Goals and Objectives conform to the requirements noted in the key considerations.

Goals	Key Considerations
Example: To ensure the community has access to persuasive information concerning the health implications of physical activity. **Draft Goal Statements for Your Physical Activity Plan** 1 _____ 2 _____ 3 _____	1. The goal must be linked to the Mission. (The example relates to the "information" aspect of the sample Mission in Toolkit 1:4A. Additional goals would be written for "motivation and "opportunities") 2. The goal should provide sufficient detail to elaborate on the Mission and identify a product or outcome of the plan.

Objectives

Example: To prepare a media campaign that will reach most residents focused on the adverse impacts of physical inactivity.

Example: To prepare an information program for children available to all community schools.

Draft Objectives for Each Goal in Your Physical Activity Plan

1 _____

_____

_____

_____

2 _____

_____

_____

_____

3 _____

_____

_____

_____

4 _____

_____

_____

_____

Key Considerations

1. Objectives are prepared for each Goal to:
   - > Explain in general terms what you will do to fulfill the goal
   - > To establish measures that will indicate if the objective was accomplished
   - > To further define the short-term focus of your plan

1 *STAGE ONE:* **STEP FIVE:** IDENTIFYING OPPORTUNITIES AND CONSTRAINTS

OBJECTIVES

- to identify opportunities in your community to improve physical activity levels
- to identify constraints to improved physical activity levels
- To consider how these opportunities and constraints might be addressed in the physical activity plan

Discussion

Before we can produce a plan for improved physical activity, we need to know the opportunities that we can capitalize upon and the constraints that must be addressed. Your investigation of opportunities and constraints will be guided by the goals and objectives you have adopted for the plan. Consequently, your focus may be on certain sectors of the community or types of physical activity. You will have an opportunity to review your goals and objectives, and possibly make changes, after you have finished gathering information in Step 6 of the process.

The committee, based on their awareness and involvement in the community, can generate an initial list of opportunities and constraints. Additions and elaborations will come with the community's input in Step 6 of the process.

Resources

The following tools are provided to assist your committee with identifying opportunities and constraints:

- Toolkit 1:5A – Identifying Opportunities (Page 37)
- Toolkit 1:5B – Identifying Constraints (Pages 38)

Outcomes and Next Steps

The committee has laid a solid foundation for the physical activity plan. The goals and objectives have been defined and an initial investigation of opportunities and constraints completed. It is now time to involve the community in the planning process.

QUESTIONS

What types of opportunities should we be identifying at this stage in the planning process?

1 *STAGE ONE:* **STEP FIVE:** THE KEY QUESTIONS

Considerations

Opportunities are any community resource that can be improved, adapted or better used to promote increased physical activity. These of course will be specific to your community and the committee should creatively explore a broad range of possible opportunities. The Toolkit 1:5 A will be of assistance.

What types of constraints should we be identifying at this stage in the planning process?

Constraints are any barriers to increased physical activity in your community. Research indicates that many of these barriers are personal – related to the attitudes, opinions and lifestyles of individual residents. Others will be environmental – constraints imposed by lack of facilities, information or access. Your plan will need to deal with personal and environmental constraints differently and you will address this in Stage Two of the planning process. The first step, however, is to identify the most important constraints to increased physical activity in your community. The Toolkit 1:5B will be of assistance.

What role should the public play in identifying opportunities and constraints?

Public input is a critical part of this assessment in your community. You will hear from the public in the next step of the planning process and this is an opportunity to test and refine the opportunities and constraints you identify at this point in the process.

TOOLKIT 1:5A

Identifying Opportunities

You can use this form to identify opportunities to expand physical activity in your community. It is important to think broadly at this stage and identify a long-list of opportunities – even if you won't take advantage of all of them in your plan. Each member of the committee should answer the following four questions and then share their thoughts to reach a committee consensus.

Q1 Are there facilities, trails, parks, open space or other physical features of this community that could be better used by residents wanting to be physically active?

Q2 Are there organizations, individuals or other vehicles in the community that we can more effectively use to promote our message about the importance of physical activity?

Q3 Are there existing programs, events or community activities that could be incorporated into our physical activity plan?

Q4 Other than the organizations represented on our committee, who else in this community could be a part of our physical activity plan?

TOOLKIT 1:5B

Identifying Constraints

You can use Toolkit 1:5B to consider physical activity constraints in your community. Each member of your committee should complete this form separately and then share their thoughts to reach a committee consensus. To complete the form, answer the following questions:

1. What are the most significant personal and environmental constraints in your community?

2. Do you have any documented evidence to substantiate the constraints you identified? If not, should these constraints be further investigated with the community? Complete Column Two in Toolkit 1:5B.

3. Not all constraints will be easy to address and some may not be feasible to address with the resources or within the timeframe of your plan. You need to identify priorities to be addressed in your plan.

4. What are the top 3 personal and environmental priorities? (Note with numbers 1, 2 and 3 in Column Three of Toolkit 1:5B)

5. Ideally, for each constraint there will be a corresponding opportunity. Review your list from Toolkit 1:5A and make notes in Column Four.

The most significant constraints	Evidence/ Information Available	Investigate Further	Top Three Priorities	Connect to an Opportunity
Personal 1				
2				
3				
4				
5				
Environmental 1				
2				
3				
4				
5				

OBJECTIVES

- To involve the community in the preparation of the plan
- To receive input to better understand important characteristics of the community that may affect the plan; appropriate goals and objectives; and opportunities and constraints.
- To test possible physical activity strategies with the community

1 *STAGE ONE:* **STEP SIX:** CONSULTING WITH THE COMMUNITY

Discussion

Your purpose in consulting with the community at this stage in the process is to gather additional information to prepare your physical activity plan. These are research activities – a communications and marketing program to encourage residents to become active will be a part of the plan and will be implemented later in the process. At this point, you are consulting with the community to confirm the committee's work in the previous five steps and test ideas that may become a part of your physical activity plan.

The approach to consulting with the community will largely be determined by the goals and objectives you have adopted for the plan and your resources. The consultation techniques available to your committee vary considerably, both in effectiveness in reaching different groups in your community and cost.

Resources

The following can assist with the design of your community consultation program:

- The Resources section of the manual includes a discussion of the effectiveness and relative cost of various community consultation techniques
- Toolkit 1:6A – Matching Consultation Objectives and Techniques (Page 42)
- Toolkit 1:6B – Community Consultation Techniques: Resource Considerations (Page 43)

Outcomes and Next Steps

Consulting with the community is the last step in the initial stage of the planning process. The community input should allow you to better understand the community's attitudes towards and interests in physical activity, the barriers to physical activity, and possible approaches to overcoming these barriers. The committee may also rethink its goals and objectives based on what they hear from the community.

With the information compiled in Stage One of the planning process and the understanding that has been gained of the community, the committee is prepared to produce its physical activity plan.

1 *STAGE ONE:* **STEP SIX:** THE KEY QUESTIONS

Considerations

You can consult with the public for three reasons:

- To collect information about your community that you can not compile from another source and that is required to prepare the plan;
- To determine or confirm the focus of the plan, target groups and priorities, and your goals and objectives; and
- To test in a preliminary manner the effectiveness of physical activity strategies that may be used in the plan.

When designing your consultation program, you must be clear about what you wish to accomplish and select your techniques accordingly.

QUESTIONS

What types of opportunities should we be identifying at this stage in the planning process?

Your public consultation program will reflect your resources, the information you wish to collect and the sectors of the community you wish to consult. There are a wide variety of public consultation techniques but those applicable to physical activity planning can be grouped into the following categories:

- Surveys and Questionnaires
- Public Meetings
- Key Informant Interviews
- Focus Groups
- Workshops

What techniques are available to us for public consultation and how do we know which will be most effective?

Within each category there are many variations but your program will likely be designed around these general approaches. They differ in resource requirements and effectiveness. Toolkits 1:6A and 1:6B will help you select the techniques best suited to your plan. A more detailed discussion of these techniques is available in the Resources section of the manual

TOOLKIT 1:6A

Matching Consultation Objectives and Techniques

OBJECTIVE	APPROPRIATE TECHNIQUES				
	Surveys/ Questionnaires	Public Meetings	Key Informant Interviews	Focus Groups	Workshops
To collect accurate, reliable information on community health indicators, physical activity patterns or barriers to participation	✓				
To determine the potential market for a physical activity project or confidently predict anticipated levels of participation	✓				
To test the general community support for physical activity plans	✓	✓		✓	
To gather in-depth insights or opinions that are specific to a special segment of the community (e.g. teens, ethnic group, etc.)				✓	
To present options or ideas and test their viability or support		✓	✓	✓	
To actively engage individuals in identifying solutions to problems or preparing plans					✓
To receive expert advice or knowledge on key aspects of the plan			✓	✓	✓
To broadly publicize and promote the plan		✓			

TOOLKIT 1:6B

Community Consultation Techniques – Resource Considerations

Technique	Expertise	Financial Resources
Surveys and Questionnaires	**High** Surveying requires specialized expertise in sampling and research design. Personal interviews should be done by trained staff. Computer capabilities are required for survey administration and analysis.	**High** Would generally be contracted to a survey research firm. Budgets in the order of $15 - $30,000 could be expected.
Public Meetings	**Low** Committee members will likely have skills to organize and conduct a public meeting.	**Low** Will depend on level of paid advertisement and extent and type of display or presentation material.
Key Informant Interviews	**Low-Moderate** Expertise required depends on focus of the interview. In most cases, can be conducted by committee members or contracted staff.	**Moderate** Generally one-on-one interviews can be a significant time commitment depending on the number of interviews and time devoted to preparation, scheduling and documenting results.
Focus Groups	**Moderate** Individuals conducting focus groups requires facilitation skills and some knowledge of the focus group participants. In most cases, can be conducted by committee member or contracted staff.	**Moderate** Depends on the number of focus groups and methods adopted for recording and documenting input.
Workshops	**High** Will require expertise to design the workshop format and prepare materials for workshop participants. Workshop leader requires expertise in subject matter and strong facilitation, problem-solving and consensus building skills.	**Moderate-High** Depends on time committed to workshop preparation, duration of the workshop and complexity of issues addressed.

PART TWO: THE PHYSICAL ACTIVITY PLAN

Stage Two:
Preparing the Plan

2 STAGE TWO: PREPARING THE PLAN

FIGURE THREE:

STAGE TWO: PREPARING THE PLAN

Your physical activity plan could involve four different but related strategies as outlined in Figure Three:

Program Strategy – new or adapted programs that are introduced in the community to increase levels of physical activity

Social Marketing and Communications Strategy – promotional information and media campaigns to encourage physical activity

Policy Strategy – changes to policies that remove barriers or otherwise encourage physical activity

Infrastructure Strategy – improved or expanded infrastructure to enhance opportunities for physical activity. Infrastructure should be broadly understood to mean new recreation facilities or parkland, recreational trails and other aspects of the built form that can promote physical activity, such as sidewalks or bike lanes that are part of the road network.

The discussion that follows will help your committee select appropriate strategies for your community.

The following resources are available in this section of the manual:

> Toolkit 2A – Identifying a Longlist of Possible Projects for the Physical Activity Plan (Page 49)
> Toolkit 2B – Identifying the Best Projects for the Physical Activity Plan: A Checklist (Page 50)
> Toolkit 2C – Managing the Implementation of the Physical Activity Plan (Page 51)

2 *STAGE TWO:* **STEP ONE:** THE KEY QUESTIONS

Considerations

Your plan may include all four strategies, but with different timetables for implementation. Initially, you will focus on the immediate need – to increase physical activity in your community. Your program strategy will address these needs and likely be the primary focus of your early efforts. However, the success of your program strategy will almost certainly depend on your social marketing and communications strategy and may depend on changes addressed in your policy strategy. Changes in policy, in particular, may take longer to put in place than new physical activity programs and the marketing required to support them. Policy change is likely something that you will continue to work on and gradually improve over the first few years of your physical activity plan. Finally, in the long-term, your goal may be to add to the facilities in your community that promote physical activity. This will require capital funding and detailed planning, and as such, are likely long-term projects. However, they can be identified as part of your physical activity plan and the ground work for facility development laid, perhaps in conjunction with other community planning projects.

The projects you identify must be rooted in your Phase One investigation – this is true whether you are identifying a new program; the need for an expanded marketing and communications program; a possible policy change or new infrastructure. There are probably a wide range of possible projects that will conform to your goals, address constraints and take advantage of opportunities and enjoy the support of the community and the implementing agencies. You should start by identifying a long list of possibilities, initially without worrying about the best choices for your community. Creatively consider all of the opportunities that may be available to you – and to the extent possible attempt to identify projects that address all four components of the physical activity plan – activities; social marketing/communication; policy and infrastructure. Toolkit 2A provides a step by step process for this brainstorming exercise that directly links possible projects to your Phase One planning activities.

This will involve making choices from among the long list of possible projects that you have identified. Available resources and the complexity associated with implementing the projects will be a major part of this decision. However, there are other considerations that may help you select the best projects for your physical activity plan. Toolkit 2B is a checklist that outlines a number of these considerations.

QUESTIONS

Will every physical activity plan include all four components (e.g. strategies for activities, social marketing/ communication, policy and facilities?

How do we identify appropriate projects for the physical activity plan?

How do we select the best projects for our physical activity plan?

QUESTIONS

How do we establish a timeframe for the implementation of our plan?

Your physical activity plan should probably be prepared for a five-year timeframe and then be regularly updated based on your annual evaluation. Setting timeframes will depend on your priorities and resources. Not all projects will have the same ability to meet your goal of improving physical activity levels and you may place a higher priority on those that will produce the best results. These projects will generally be implemented first, subject to available resources. Your timing will also be influenced by the period required to implement the project. A new program or marketing effort might be introduced in a matter of months; while a significant change in policy may require a year; and infrastructure projects could take many years to put in place. Your physical activity plan will likely have a variety or projects with different timelines and these should be reflected in a long-term implementation strategy.

How do we manage the implementation of the physical activity plan?

It is likely that your physical activity plan will involve a number of agencies and a number of different types of projects with both short and long term implementation schedules. Procedures should be adopted to manage the implementation of the plan. These procedures can also be tied to the annual evaluation of the plan, as discussed in the next section of the manual. Toolkit 2C provides a simple approach to managing implementation. Your committee could adapt a form of this type and update it on a regular basis. At minimum, for each project, you should track:

> Implementation Agencies: The agency responsible for implementation. In most cases, there should be a lead agency, even if there are supporting partners. The lead agency is ultimately accountable for implementation.
> Timetable: Some projects may be completed in the current year, but many will likely operate over a number of years. In the case of policy or infrastructure projects, where there is a defined end product such as a revised policy on community access to facilities or the construction of a new walking trail, you may be able to specify an anticipated end-date for the project.
> Budget: Both current and future budgets should be tracked. For future budgets some or all of the funds may be projected but not yet approved.
> Approvals/Authorization: Approval of budgets will likely be required and other types of authorization may be required to proceed with some projects (e.g. approval by an external funding agency for a capital project; or approvals for site planning or design projects by local authorities, etc.). Tracking the necessary approvals should be a part of the implementation strategy.

You may incorporate other considerations in your implementation strategy depending on the nature and complexity of the projects, the partners involved and the management and approval systems in place in your community.

TOOLKIT 2A

Identify a Long List of Possible Projects for the Physical Activity Plan

Your committee can use this process to brainstorm around projects for your plan. The starting point is your Goals and Objectives – you should follow this process for each Goal / Objective in your plan. The information you require to answer Questions One to Four was gathered in Phase One of the planning process.

Q1 **What did we say we would accomplish and who would be affected? (from Goals/Objectives)**	Q2 **What is unique about our community that will affect the plan? (from the Community Profile)**	Q3 **What opportunities and constraints are relevant to our plan? (from Opportunities / Constraints and Community Consultation)**	Q4 **What has worked elsewhere? What will affect our success? (from Phase One Research)**	Q5 **What types of projects might work in our community?**
		Opportunity		a) Activities
				b) Social Marketing
		Example > well-established social networks > seniors regularly meet in social clubs		c) Policy
		Constraint		d) Infrastructure
Example > encourage non-active individuals to start walking > to focus on seniors	**Example** > large multicultural senior population, many new to Canada > strong involvement in church activities	**Example** > language barrier > cultural norms re: physical activity > concern for personal safety	**Example** > Effective program requires personal leader > Participants value privacy and security	**Example** a) Instructor-lead training program incorporated in church social activity b) Translate brochures on health impacts of non-activity c) Address insurance issues re. Instructors in non-municipal setting

TOOLKIT 2B

Identifying the Best Projects for the Physical Activity Plan: A Checklist

This checklist identifies a number of criteria that can be used to select projects for your plan. Not all criterion will be applicable to every project. Your committee may identify other criteria relevant to your plan. Rank proposed projects on a scale of 1-5 depending on how well they fulfill each criterion.

Criteria	Not applicable	Proposed Projects Fulfills Criterion				
		Completely		Satifactorily	Not at all	
		5	4	3	2	1
Will achieve the goals and objectives of the plan						
Will addresses the needs of segments of the community targeted in our plan						
Will produce the desired results in the desired timeframe						
Will be supported by the parties responsible for implementation						
Has an existing agency prepared to assume responsibility for implementation						
Will be supported by the community						
Will be supported by community and external funding agencies						
Will not conflict with or duplicate existing projects in the community						
Takes full advantage of existing resources in the community						
Can realistically be implemented within the plan's timeframe						
Can be implemented with available financial resources						
Can be implemented with available staff resources						
Is financially viable and sustainable over the long term						
Other Criteria:						

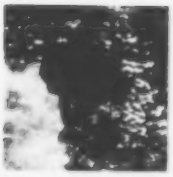
TOOLKIT 2C

Managing the Implementation of the Physical Activity Plan

Your committee requires an implementation strategy for the physical activity plan. The implementation strategy will describe responsibilities, timeframes and resources for the projects identified in your plan. This is particularly important if implementation is shared by a number of agencies. The following form can be used by your committee to manage implementation of projects on a year-to-year basis.

Projects	Implementing Agencies		Timetable		Budget	Future Budget		Approvals Authorization	
	Lead	Support	Current Year	Continuing	Current Year	Projected	Approved	Required	Received/Date
1				Expected End Date:					
2				Expected End Date:					
3				Expected End Date:					
4				Expected End Date:					
5				Expected End Date:					
6				Expected End Date:					

PART TWO: THE PHYSICAL ACTIVITY PLAN



Stage Three:
Measuring Success

3 STAGE THREE: MEASURING SUCCESS

FIGURE FOUR:

STAGE THREE: MEASURING SUCCESS

In the final stage of the planning process, you measure the success of your efforts and make changes to the plan, as required, to better realize your Mission, Goals and Objectives. This involves three important steps as outlined in Figure Four.

You will first identify what in your view constitutes success – what are realistic physical activity targets that you can achieve with your plan. You will also need to decide how you will measure your success. You will then do the measurement. Your approach to measuring the outcomes of your plan must be both meaningful and realistic. Finally, you need to make changes to the plan based on the results of your evaluation.

This section of the manual describes these activities.

3 *STAGE THREE:* **STEP ONE:** IDENTIFYING TARGETS FOR SUCCESS

OBJECTIVES

> To determine which characteristics of the physical activity plan will be evaluated

> To identify measures to evaluate the success of the plan

> To establish targets which will be used to evaluate the outcomes of the plan

Discussion

You need to evaluate the success of your plan to demonstrate progress to your partners and to the community. Your accomplishments will ensure continued support, as will your willingness to monitor any short-coming and take steps to improve the plan. The importance of evaluating the plan is clear. The challenge is to establish a meaningful yet realistic evaluation approach. Your committee is unlikely to have the resources to compile information to rigorously and scientifically evaluate changes in physical activity patterns or improved health in your community. You can still evaluate your plan. You will simply rely on measures that while less scientific are still meaningful and persuasive. The first step in the evaluation process is to identify these measures and your targets for success.

The scope of the evaluation is also important. Broadly speaking you are conducting three evaluations. You want to know:

> Did we succeed in doing the things that we said we would in the first year of the plan? If not, why not?
> Did the programs, projects and other activities that were implemented in the first year of the plan succeed in raising levels of physical activity?
> Is the purpose and focus of the plan, as defined a year ago, still relevant and still our priority?

You will consider these questions in Step 3 of the evaluation process. At this point, you simply need to be sure that you collect information to answer all of these questions.

Resources

> Toolkit 3:1A – Linking Evaluation Measures to Goals and Objectives (Page 58)
> Toolkit 3:1B – Community Based Information: Indicators of Success (Page 59)

Outcomes and Next Steps

At the end of this step you will have reasonable and useful measures for evaluating your physical activity plan. You are now ready to collect the information and evaluate your success.

3 *STAGE THREE:* **STEP ONE:** THE KEY QUESTIONS

QUESTIONS

What type of information can we assemble to evaluate the success of the physical activity plan?

Considerations

The primary reason you are encouraging physical activity is to improve the health of your community. A more active community will be a healthier community and evidence indicates a wide range of personal, social and economic benefits will be enjoyed by healthy communities. However, very few communities will have the resources or expertise to measure changes in health that can be attributed to their physical activity plan. There are ways to document a healthier community – but it is unlikely that you will directly measure these changes.

You can simply and effectively collect two types of information to measure the success of your physical activity plan. You can monitor:

- The number of people participating, new programs, additional program hours, etc. introduced as a result of your plan. These are direct, quantifiable measures that can be attributed to the plan
- Increased opportunities for physical activity resulting from recommendations in the plan. These are changes in the "environment" in your community that support physical activity but may not result in quantifiable measures of increased participation.

How do we decide what we want to measure?

Your measures must be directly tied to the Goals and Objectives you adopted for the plan (in Stage One: Step Four). Toolkit 3:1A describes a process for making this link.

What is the role of the planning committee?

There are a number of organizations that routinely collect information on physical activity levels and community health indicators. You used these information sources in the initial stage of the planning process to profile your community (Stage One: Step Two). This information, and perhaps other similar information from new sources, will continue to be available and can be documented as part of your evaluation. These of course are broad measures of community activity and health and it will not be possible to claim that improvements are solely the result of your physical activity plan. Nonetheless, they are credible, relevant measures and point to the importance of your plan and other similar initiatives in the community. These are important measures and you should use them to evaluate your plan's success.

Your purpose is to enter into a continuing dialogue with your community that promotes the value of physical activity and garners support for ongoing planning for healthy communities. The community's perception of the committee's plan and its consequences are therefore very relevant. Feedback, in a variety of forms and from a wide range of sources, should be assembled to evaluate the results of the plan. This information may not meet academic standards of reliability, but it is meaningful, relevant and often extremely persuasive. Your partners, community stakeholders and funders may be more interested and impressed by this qualitative information than they are by the hard data collected from other sources.

Toolkit 3:1 B describes this type of information and how it might be used in the evaluation.

QUESTIONS

Other than factual information and quantifiable data, can we compile other information that is useful in our evaluation?

The plan's implementation must proceed to a certain point before progress can be evaluated and some of your programs or projects may have a long implementation schedule so the results will not be evident for some time. However, as noted above, much of the evaluation information that you are collecting is descriptive data about programs or events that were the result of the plan. This information is available immediately; whereas actual health impacts or sustained changes in physical activity may take longer to materialize.

Conducting annual evaluations likely makes sense. This will be a reasonable cycle for documenting program statistics and other information that describe initiatives arising from the plan. It also corresponds to the cycle for setting priorities, budgets and allocating resources for most organizations that will be involved in the planning process. You should probably conduct annual evaluations but depending on the duration of the plan, you may conduct more comprehensive and detailed evaluations on a more variable cycle, perhaps every 2 or 3 years.

What is an appropriate timeframe for evaluating our plan?

TOOLKIT 3:1A

Linking Evaluation Measures to Goals and Objectives

This form can help you link Goals and Objectives to possible evaluation measures. Consider the example given and then complete the bottom of the form based on the Goals and Objectives of your plan.

***If this was your* Goal**	***And these were your* Objectives**	***These are* Possible Measures**
To ensure the community has access to comprehensive persuasive information concerning the health implications of physical activity	To prepare a media campaign that will reach most residents focused on the adverse impacts of physical inactivity	> number of advertisements/ media spots placed by the committee > number of newspaper stories/articles appearing in local media > number of individuals reporting an awareness of health implications of physical activity
	To prepare an information program for children available to all community schools	> number of school visits or schools contacted > number of school children exposed to information > number of children reporting an awareness of health implications of physical activity > number of teachers reporting increased awareness of health implications and/or increased physical activity

Note Your Goal	**Note Your Objective**	**Identify Possible Measures**

TOOLKIT 3:1B

Community-based Information – Indicators of Success

Use this form to consider a wide range of possible community-based evaluation measures. Review the sources and examples in Column One and Two, and complete Column Three for your plan.

Information Type / Source	Examples	Possible Indicators for Your Plan
Expert Opinion	Statements attributing improved physical activity or health to your plan from credible, knowledgeable or expert individuals, such as school physical activity teachers, local doctors, sports and recreation directors and volunteer coaches or trainers.	
Testimonials	Statements from local participants in programs or projects resulting from your plan claiming improved physical activity or healthy lifestyles.	
Media Accounts	Newspaper stories, pictures and other media documenting programs, projects or activities associated with your plan.	
Committee Documentation	Newsletters, advertisements and other information prepared by the committee and documenting the scope of the physical activity plan.	
External support for the Physical Activity Plan	Evidence of support from external authorities for the committee's effort (e.g. grants to support the planning process).	
Community Investment in the Physical Activity Plan	Documentation concerning financial or other support (e.g. staff time committed, volunteer hours, sponsorships) received from the community for the physical activity plan.	

OBJECTIVES

- To identify information gathering techniques for measuring the success of the plan
- To compile the information required for the evaluation.

3 *STAGE THREE:* **STEP TWO:** MEASURING SUCCESS

Discussion

Your choice of information gathering technique will depend on your resources and the level of confidence you require in the results. In almost all cases you will have a variety of options for collecting evaluation information. They all produce useful and meaningful information. However, some will provide more scientific data that will let you claim success with greater confidence. Generally you can assume that the greater the confidence, the greater the resource requirements. Ultimately, you should select information-gathering techniques that you believe are meaningful and persuasive in your community.

Resources

The following resources will help you select information gathering techniques that are appropriate for your community.

> Toolkit 3:2A – Information Sources for Evaluation (Page 62)

Outcomes and Next Steps

With the required information in hand, you are ready to evaluate the success of your physical activity plan.

3 *STAGE THREE:* **STEP TWO:** THE KEY QUESTIONS

Considerations

Depending on the measures you intend to use for your evaluation, you may use any of five sources of information. These are:

- Data available from organizers and operators of programs or events associated with the plan
- Data available from people participating in programs or events associated with the plan
- Opinions from knowledgeable and informed individuals in a position to comment on the success of the plan's initiatives.
- Community based information of a descriptive or anecdotal nature
- Data from external sources, including national or provincial surveys and health indicators

These sources of information and the types of measures that might be collected were discussed in the previous section of the manual. Additional examples of information sources and the types of information that might be compiled are illustrated in Toolkit 3:2A.

QUESTIONS

What techniques are available to compile information for the evaluation?

This will depend on two major considerations: Your resources and desired level of confidence. The resources – including funds, expertise and time – required to assemble information for the evaluation differ. Assuming you knew what you wanted to measure from the outset (as discussed in Stage One: Step Two of the manual), it should be easy to assemble data from program records. Compiling information from program participants or key informants may be more difficult and costly (see discussion of public consultation techniques in Stage One: Step Six of the manual). Information from external sources requires little effort on your part, but may not be available in a timeframe or format that meets your needs. Your desired level of confidence in the results may also affect your choice of information source. Generally, quantifiable data collected in a controlled manner to ensure it is valid, comprehensive, and representative, will result in higher levels of confidence. However, as discussed in the previous section of the manual, scientific rigour is seldom expected or necessary when evaluating physical activity plans.

How do we decide on the best technique for collecting evaluation information for our plan?

TOOLKIT 3:2A

Information Sources for Evaluation

Use this form to consider information sources in your community. Identify possible measures in Column One, similar to the examples given. Your measures should be tied to your Goals and Objectives (see Toolkit 3:1A in the previous section of the manual). Once you have identified measures, consider possible information sources by completing Column Two. If you are satisfied you have the necessary resources to compile the information and evaluation meets your confidence requirements, indicate this in Columns Three and Four.

1. What is our Measure of Success	2. What are Possible Sources of Information					3. Do we have the resources to Compile Required Information			4. Does this Source of Information Provide Sufficient Confidence in our Evaluation
	Program or Plan Records & Documents	Program or Activity Participants	Key Informants	Community Information	External Sources	Funds	Expertise	Time	
Number of people participating in community fitness challenge									
Kilometres of new walking trails constructed									
Residents reporting higher levels of physical activity									
Lower levels of child obesity									
1.									
2.									
3.									
4.									
5.									
6									

3 *STAGE THREE:* **STEP THREE:** EVALUATING AND UPDATING THE PLAN

OBJECTIVES

- To document the results of your evaluation of the physical activity plan.
- To consider adjustments to the plan based on the evaluation results.

Discussion

As discussed earlier, you are conducting three evaluations. You want to know:

- Did we succeed in doing the things that we said we would in the first year of the plan? If not, why not?
- Did the programs, projects and other activities that were implemented in the first year of the plan succeed in raising levels of physical activity?
- Is the purpose and focus of the plan, as defined a year ago, still relevant and still our priority?

An approach for answering these questions is illustrated in Toolkit 3:3A and discussed in this section of the manual.

Resources

We have provided the following resource to assist with this step of the evaluation:

- Toolkit 3:3A – Implementing the Plan's Evaluation (Page 66)

Outcomes and Next Steps

This step concludes the first round of the planning process. You will have evaluated the success of your first year plan and be in a strong position to make improvements for the second year.

QUESTIONS

How can we use the evaluation to determine if the plan itself is appropriate or requires revisions?

How do we judge the success of our committee's efforts to implement the plan?

Once we have the measures, how do we determine if they constitute success?

3 *STAGE THREE:* **STEP THREE:** THE KEY QUESTIONS

Considerations

Before you can evaluate the success of the programs and projects identified in your plan, you need to evaluate your success with implementation. The best made plans will have little impact if the recommendations are not put in place. Unfortunately, it is not uncommon for good plans to sit on a shelf and for recommendations to be ignored or partially implemented. If this has happened to your plan, you need to determine the reasons why and act to correct the barriers to implementation before you worry about revising the plan for the next year.

This is essentially a question of how much improvement is enough. There are three ways to address this question. Success can be defined as:

> Any improvement in physical activity levels in your community. These can be measured against the baseline you prepared for the community profile (Stage One: Step Two).
> Approaching or exceeding targets established by your committee for your plan; or, generally accepted guidelines describing levels of physical activity necessary to realize health benefits.
> Year-to-year improvements that show progressively higher levels of physical activity.

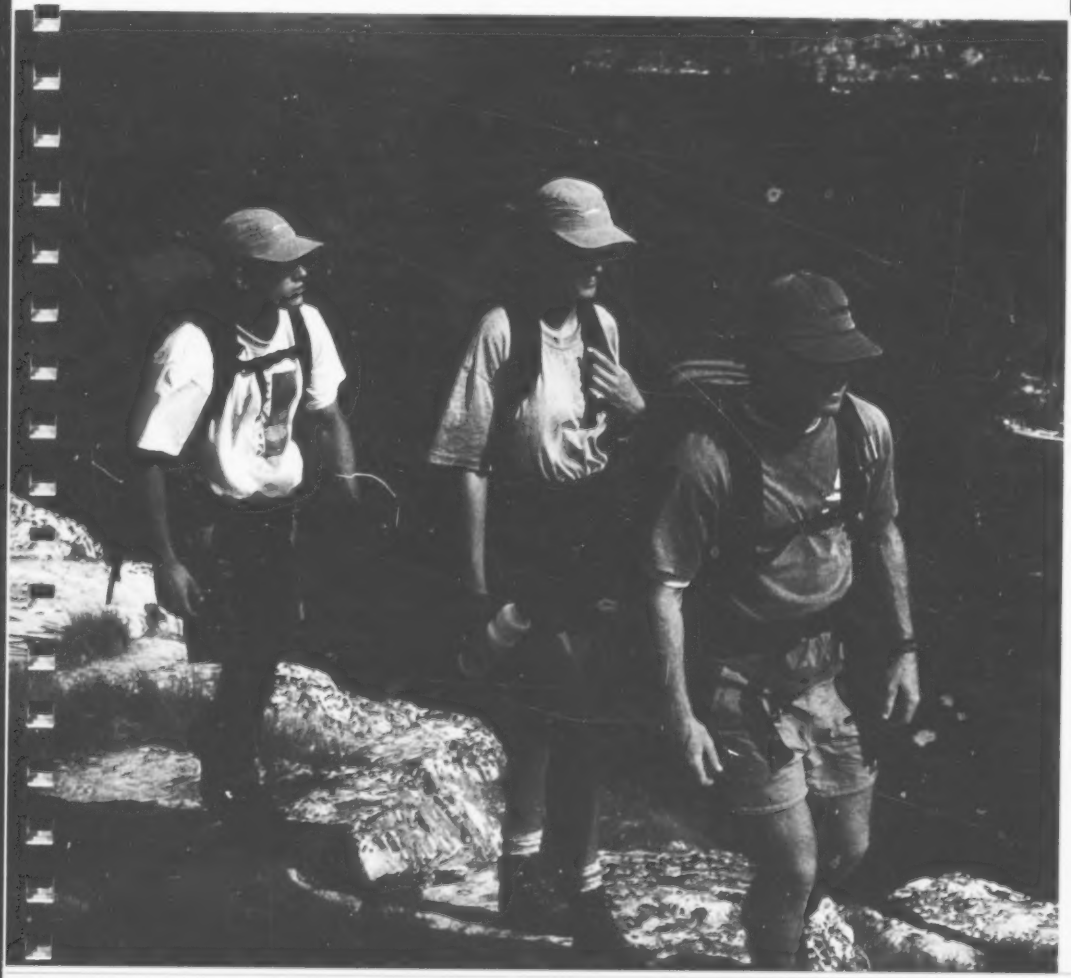
All of these are useful and valid measures of success. Measuring year-to-year improvements are particularly useful because they are specific to your community; they acknowledge that your community starts from a different place than other communities; and these measures can be tied directly to the plan and used to manage and finance a long-term strategy. In this situation, the community agencies responsible for the plan would tie future funding requests and support for their programs to a demonstrated year-to-year improvement in performance.

The evaluation measures will indicate to what extent the projects in your plan increased physical activity levels in your community. If the results do not meet your expectations, you can abandon or restructure the project. If you decide to restructure the project, the changes you make should address the reasons why the project failed to meet your expectations. Toolkit 3:3A describes a process for addressing these questions.

To answer this question, you must revisit your Mission, Goals and Objectives and determine if these are still relevant and still the committee's priorities. It is unlikely that the committee's Mission will need to be significantly altered, particularly in the initial years of the plan. Similarly, at least initially, your Goals will probably still be relevant. However, you may decide you were too ambitious and adopted more goals than could be realistically addressed. You may also adopt new Goals (and eliminate existing Goals) if your priorities have changed. Your Objectives, which define short-term accomplishments, are most likely to be adjusted annually. Ideally, you will have achieved your Objectives and be in a position to adopt new Objectives for the next year of the plan's implementation. However, it is not necessary to revise your Objectives annually. Your Objectives may continue to be relevant and may be pursued over a number of years.

QUESTIONS

How can we use the evaluation measures to make changes to the projects or programs that were a part of our plan?



TOOLKIT 3:3A

Implementing the Plan's Evaluation

Use this form to consider the success of your physical activity plan and improvements for next year. Start by identifying specific projects or programs that were a part of your plan in the past year (e.g. to introduce a walking club for seniors, to expand the walking trails in the community, to change school board policies so that residents had greater access to school gymnasia). Complete this form for each project represented in your plan. Answer the questions indicated to complete your evaluation.

Information Type / Source	Examples	Possible Indicators for Your Plan
Q.1 Was the project implemented as planned in the past year? ☐ Yes (Go to Q.2) ☐ No	**Q. 1A Why Not?** ☐ Insufficient funds ☐ Limited community / political support ☐ Not enough time for the committee to implement ☐ Other:	**Q. 1B Should the project be included in next year's plan?** ☐ Yes. Why? ☐ No. Why not?
Q.2 Did the project meet your expectations for increasing physical activity in the community? ☐ Yes (Go to Q.3) ☐ No	**Q.2A Why Not?** ☐ Insufficient participation / community response ☐ Resources required were too high given the outcome ☐ Too early to tell ☐ Other	**Q. 1B Should the project be included in next year's plan? If included, should it be revised?** ☐ Yes. Why?/How revised? ☐ No. Why not?
Q.3 Is the project still relevant and still enough of a priority to be included in next year's plan?	☐ Yes. Why? ☐ No. Why not? What, if anything, would you replace it with?	

PART THREE: RESOURCES

INTRODUCTION

This section of the resource manual includes information that may assist you in your planning process. The following resources are included:

Part One: Case Studies – Physical Activity Campaigns

Part Two: Public Consultation Techniques

Part Three: Preparing Terms of Reference for Physical Activity Plans

Part Four: Literature Review: Factors Affecting Intervention Programs

Part Five: Bibliography and Websites for Further Information

RESOURCES:

> Case Studies:
PHYSICAL ACTIVITY CAMPAIGNS

CASE STUDIES: PHYSICAL ACTIVITY CAMPAIGNS

The following are selected references to other physical activity campaigns in Canada and elsewhere. The list is by no means comprehensive but it provides some indication of what has been undertaken elsewhere.

In almost all cases these case studies are "program strategies" rather than physical activity plans as discussed in this manual. They describe a *program*, frequently undertaken by a variety of community partners, with the objective of increasing physical activity levels. In most cases, the programs are accompanied by a communications or social marketing strategy. However, these case studies are not comprehensive physical activity plans based on the type of information gathering and analysis discussed in Stage One of the planning process outlined in the resource manual. Further, most of the case studies are focused on a specific program and do not appear to address "policy" or "infrastructure" components of a comprehensive physical activity plan.

Case Study #1 describes the "In Motion" program in Saskatchewan. There are a number of resources associated with this program, which are similar in some respects to this resource manual, and may be worth pursuing.

We have adopted a consistent format to describe the case studies which summarizes:

- Goals
- Duration of the Program
- Target Audiences
- Key Partners
- Approach
- Evaluation/Successes
- Additional Information Sources

Information is not available under all headings for all case studies. In all cases a website is provided for additional information on these programs.

Case Study 1: *In Motion* Series

Goal	To have all citizens in a community include regular physical activity in their daily lives for health benefits
Duration	On-going
Target Audience(s)	All segments of the community: children and youth, inactive adults, workplace wellness, older adults, primary prevention of diabetes (predominantly aboriginal community), healthcare professional referral
Key Partners	> Saskatchewan Parks and Recreation Association, Saskatchewan Health Region, Federation of Saskatchewan Indian Nations Inc., and SaskSport Inc.
Approach	> Uses a 10-step approach to create a health promotion strategy – establishes a common vision, builds community partnerships > Step 1: Establish an advisory committee > Step 2: Create a community vision and mission statement > Step 3: Identify existing community resources and barriers > Step 4: Identify target areas > Step 5: Creating working groups > Step 6: Review *in motion* resources > Step 7: Create measurable objectives > Step 8: Develop an action plan > Step 9: Evaluate your activities > Step 10: Celebrate your success Provides communities with the tools to establish a system of communications and to develop a marketing plan; an evaluation plan gives the means to measure the community's success and progress
Evaluation/ Successes	Evaluation is an ongoing and critical process to the initiative. Strategy has built-in program review and University of Saskatchewan led research. > In motion has demonstrated its effectiveness in achieving its primary goal of increasing the levels of physical activity in a community for health benefits > Increased the number of people in Saskatoon and region who are active by 14 % from 2000 to 2004 > Almost half of residents who are aware of *In motion* indicate the initiative has increase their awareness of how physical activity can benefit their health > Many residents suggest they have increased their activity levels since becoming aware of *In motion*; 1 in 10 characterize their activity level as moderate or high since the awareness of In motion > Approximately _ of residents who are aware of In motion indicate they are experiencing benefits associated with increased physical activity. Most commonly mentioned benefits include more energy, improved fitness and better health
Additional Information	http://www.in-motion.ca/

Case Study 2: Active Edmonton

Goal	To encourage all Edmontonians to value and regularly participate in physical fitness activities
Duration	5 years, started May 2003
Target Audience(s)	General public, but after first year, each subsequent year to include a specific target group (2004 Children and Youth; 2005 Workplace; 2006 Older Adults; 2007 Communities)
Key Partners	The City of Edmonton and over 35 community partners and 60 volunteers
Approach	> Strategy includes program, marketing, research and evaluation, and networking initiatives > Booklets, Active Edmonton Challenge, Mayor's Active Edmonton Awards, Active Edmonton Research and Evaluation > Marketing initiatives include: ActivEdmonton.ca; television commercials (3); radio commercials; print advertising; billboard and transit advertising; bridge banners and signage; posters; media launch; portable display/media backdrop; Active Edmonton brochure
Evaluation/ Successes	> 30% of citizens were aware of Active Edmonton nine months after initiation > Increase in number of people seen being active Active Edmonton is currently in the process of completing research to evaluate impacts; final report should be available in March 2005
Additional Information	http://www.activedmonton.ca

Case Study 3: Toronto – *Get your move on*

Goal	To increase physical activity among children, youth and families by creating more opportunities, and reducing barriers, to enable all residents to be physically active where they live, work, learn and play
Duration	3-year strategy, started June 23, 2004
Target Audience(s)	Children, youth and families
Key Partners	A wide variety of individuals, community groups, agencies, institutions, businesses and all levels of government. A list of all partners is found in the website noted bleow.
Approach	Reducing systemic barriers to physical activity
Evaluation/ Successes	*Get your move on* is in preliminary stages of implementation; no formal assessment of its success has been made
Additional Information	www.toronto.ca/getyourmoveon

Case Study 4: Ottawa – *Heart Beat*

Goal	To increase the number of City of Ottawa residents who participate in sufficient daily physical activity to achieve and maintain health benefits
Duration	5-year Strategy (2003 – 2007)
Target Audience(s)	Residents and visitors of all ages
Key Partners	City of Ottawa, schools, major employers, organization in the fitness industry, the media, service clubs, community recreation organizations, Ottawa Heart Beat
Approach	Community-wide initiatives, school initiatives, workplace initiatives,
Evaluation/ Successes	*Heart Beat* is currently in preliminary stages of implementation; no formal assessment of its success has been made
Additional Information	http://www.ottawaheartbeat.com/

Case Study 5: Active Halifax Communities

Goal	To embrace and encourage active living opportunities for children, youth, and their families.
Duration	3 years
Target Audience(s)	Children, youth and families
Key Partners	The Sport and Recreation Division of the Office of Health Promotion; Recreation, Tourism and Culture – Halifax Regional Municipality; Capital Health; Halifax Regional School Board; YWCA; Sport Nova Scotia; Girl Guides of Canada
Approach	Components include: Participation, Advocacy and Community Capacity; Girls Soar 2004, encouraging girls' participation
Evaluation/ Successes	Not Available
Additional Information	http://www.activehalifax.ca/

Case Study 6: Rockhampton, Australia - 10,000 Steps

Goal	> To raise state/national awareness of the health benefits of moderate physical activity > To strengthen the capacity of general practitioners and other health professionals to promote physical activity > To strengthen the capacity of communities within the state/nation to provide improved opportunities, social support, policies and environments for physical activity > To strengthen the capacity of individuals to be more active, by addressing modifiable individual, social and environmental determinants of (in)activity
Duration	2 year trial period starting in 2001; funding was extended to 2004
Target Audience(s)	All members of the community
Key Partners	University of Queensland, Heart Foundation, Government of Queensland, Sports Medicine Australia, Central Queensland University, Queensland University of Technology
Approach	5 key strategies: > Local media campaigns: to raise awareness of the low levels of physical activity in the community, profile the program theme, profile community role models and promote associated activities > Promoting physical activity through general practice and other health services: allied health care providers engaged to make referrals to physical activity resources, disseminate current activity guidelines and advocate behaviour change > Improving social support among disadvantaged groups: involves working with community partners in the health, sport, recreation and fitness sectors to provide leadership for activity programs targeting the needs of disadvantaged and special needs groups > Policy and environmental change guided by publication *Creating Active Communities: Physical Activity Guidelines for Local Councils,* with a focus on developing infrastructure to promote active living in the community > Community initiatives: A 'community fund' established to support community-based initiatives and competitions to increase physical activity in local neighbourhoods, small workplaces and non-government organizations.
Evaluation/ Successes	> Not Available
Additional Information	http://www.10000steps.org.au/index2.html

Case Study 7: Moncton - Stepping Out Moncton

Goal	To increase physical activity levels
Duration	12-week program
Target Audience(s)	Workplaces, schools, community organizations
Key Partners	Canadaeast.com; Dairy Farmers of Canada; L'Etoile; Times and Transcript; New Lifestyles Canada; PEI Active Living Alliance; Province of New Brunswick; NB Success
Approach	Pedometer program - used to motivate Referrals to dieticians and fitness professionals
Evaluation/ Successes	> Strong delivery system > Affordable > Simple/uncomplicated (pedometer) > Adaptable – workplace/groups/schools > Results from similar PEI initiative: 74% indicated initiative was very effective in increasing their physical activity levels 97% agreed that the pedometer was a great source of motivation 89% believed support group meetings contributed to their success
Additional Information	http://www.moncton.org/v/

Case Study 7: Christchurch, New Zealand - Christchurch City Council's Active Christchurch Project

Goal	To create a supportive environment where people can enjoy all the benefits of physical activity
Duration	Not specified
Target Audience(s)	Youth, older adults
Key Partners	Schools, Community Trust, *SafeKids,* Sport and Recreation New Zealand, *Push Play,* regional sports trusts, Land Transport Safety Authority
Approach	> KiwiAble programme, which encourages people with disabilities to be physically active and provides opportunities to enjoy recreation and physical activities > Walking programmes > Cycling programmes > Safer Routes to School (includes Walking School Bus programme) > Cycle-sage school cycle training > HeartBeat Challenge/Let's Get Moving
Evaluation/ Successes	The CCC monitors a number of the programs to track trends and to assess effectiveness through surveys
Additional Information	http://www.active.christchurch.org.nz/

RESOURCES:

> Public Consultation Techniques

PUBLIC CONSULTATION TECHNIQUES

The purpose of your public consultation program is to inform and engage - ideally, the whole community but more realistically, as many people and organizations as possible - in preparing your activity plan. Engagement includes both active participation in formulating the plan, as well as support for its mission and goals. The community must "buy-in" or it will be difficult to achieve desired targets for increased activity. In designing a public consultation program, therefore, it is advisable to use a variety of techniques to ensure broad-based coverage and connection with the all sectors of the community, and to provide different audiences appropriate vehicles for input. Using a variety of techniques will also help ensure that the weaknesses of one tool are offset by the strengths of others. The following Figure outlines the types of tools that will be useful in preparing your activity plan.

The composition of your public consultation program will, of course, depend on the resources at your disposal. Ideally, your program should include a community-wide survey, several public meeting/open house events, key informant interviews and a selected number of focus groups and/or workshops. Community-wide surveys are costly. At the same time, the input of those who are being asked to become more active will be central to designing a relevant, workable plan. The key, therefore, will be to adopt a survey technique that will be useful while falling within your budget and schedule for completion of the plan. At one end of the scale are random surveys conducted by personal interviews that provide the basis for statistically significant analysis. These are representative of community opinion. At the other end of the "questionnaire" scale are techniques that involve the distribution of comment sheets at key locations/events and that people are requested to complete on-the-spot. Web-based surveys fall somewhere between these two options, both in terms of cost and ease of administration. On-line survey packages can be purchased, tailored to meet your needs, and posted on websites for visitors to complete. All techniques except the randomly administered survey, however, involve self-selection on the part of the respondent and so run the risk of bias.

In addition to a survey/questionnaire technique aimed at soliciting the input of residents throughout the community, your program should include at minimum public gatherings at key points in the plan's preparation, key informant interviews and opportunities for relevant target audiences (e.g., older adults, youth, women and girls, ethnic communities etc.) to provide input on options/strategies to increasing their levels of physical activity.

FIGURE 1: PUBLIC CONSULTATION TECHNIQUES

Technique and Relevance to Activity Plan	Description and Application	Strengths	Weaknesses
Surveys & Questionnaires > in preparing your activity plan, these techniques can be used to solicit residents' opinions about current levels/patterns of physical activity, barriers to participation, activities of interest, support for various means to expanding opportunities to increase activity, and profile data on the community (e.g., age, sex, neighbourhood etc.)	> telephone, in-person, mailed or on-line responses to a series of pre-designed questions on the topic/issues being addressed > usually comprise both pre-categorized and open-ended, opinion questions > potential respondents are selected at random from the community-at-large, contacted and asked to participate or are solicited at various locations throughout the community (e.g., community centre, library, shopping centre etc.) or on-line at selected, relevant websites	> provides directly comparable responses to a potentially large number of questions > allows for broad-based inclusion of community opinion > ensures confidentiality of expressed ideas/opinions > *if proper methods are adopted,* this is the only means to accurately investigate public opinions that are truly representative of the community	> time consuming and costly to administer, particularly when a random sample is used to ensure statistical significance > less opportunity to explore/elaborate on reasons behind responses to provide in-depth understanding > precludes clarifying apparent inconsistencies in an individual's responses
Public Meetings, Community Forums and Open Houses > in preparing your activity plan, these techniques can be used at key points in the process when it is important to bring the community together (e.g., at the outset to introduce and explain the project; to present draft recommendations; to present the final plan)	> presentations/discussions that are open to all members of the public > attendees can also be provided the opportunity to submit comment sheets/brief questionnaires while at the meeting	> can increase the profile / publicity associated with the project > promotes recognition and acknowledgement that the project is a community endeavor > allows for face-to-face interaction and idea/opinion exchange > permits exploration of issues, in-depth discussion > allows visual components to be used in presentation > offers opportunity to publicly clarify the plan's purpose, process recommendations etc., and to resolve any misunderstandings	> attracts only those interested in the topic at hand and available to attend, which may result in low turn-out and/or an imbalance in community opinion/interest represented > subverts issues/opinions that attendees are not comfortable discussing publicly

FIGURE 1: PUBLIC CONSULTATION TECHNIQUES

Technique and Relevance to Activity Plan	Description and Application	Strengths	Weaknesses
Key Informant Interviews > in preparing your activity plan, this technique can be used to ensure all potential partner organizations in the community are given the opportunity to contribute to identifying and resolving relevant issues	> one-on-one, in-depth in-person or telephone interviews with individuals in the community who are knowledgeable about the topic/issues being addressed, and can identify potential opportunities for/constraints to implementation at an organizational level	> allows for in-depth discussion of both general and specific issues > provides a vehicle for the experience and expertise of community leaders and agency representatives in all sectors to help inform the preparation of a community-specific plan	> potential for bias, which must be offset by broad representation > translation/interpretation of information gathered requires experience and insight on the part of interviewer
Focus Groups > in preparing your activity plan, this technique can be used to solicit input from identified target audiences in the community	> small group (10 to 12 people) discussions to solicit input from the perspective of those with common interests that differ from other groups in the community	> allows in-depth, focused discussion on components of the larger project > provides input on directions early in the process, and may suggest changes/further development that will make actions more effective > best suited for reaching segments of the community that may not be represented in a random survey (e.g., youth, specific multi-cultural populations)	> by definition, limited focus and few participants precludes potential to maximize community coverage > small group's opinion may not be representative > skill of facilitator is particularly important for useful results
Focus Groups > in preparing your activity plan, this technique can be used to identify the most feasible option(s) among a potential "long list" of choices to increasing physical activity levels.	> active, working small group sessions directed at problem-solving	> allows community members to participate in the process of arriving at solutions to specific problems > promotes appreciation of issues, constraints, trade-offs involved in the decision-making process > supports working together, consensus-building, etc.	> requires sufficient preparation/knowledge on the part of participants to be meaningfully engaged > by definition, limited focus and few participants precludes potential to maximize community coverage > skill of facilitator is particularly important for useful results

RESOURCES:

> Preparing Terms of Reference for Physical Activity Plans

QUESTIONS

What is a reasonable timetable for doing the plan?

Who are the possible community partners for the physical activity plan?

What is the role of the planning committee?

PREPARING TERMS OF REFERENCE FOR PHYSICAL ACTIVITY PLANS

As discussed in Stage One: Step One: Managing the Plan, your committee might choose to hire an outside consultant to prepare your community's activity plan. Using this approach, the committee would select a consultant to undertake the project from a number of qualified candidates. Several consultants, therefore, would submit proposals to the committee outlining their approach to preparing the plan, the products and services they would provide in the process, and a schedule and budget for the project. Terms of Reference are required, therefore, to inform prospective consultants about the committee's expectations for the project and should always be provided when calling for proposals from outside consultants.

Terms of Reference provide detailed and specific direction on all areas of the project: purpose, objectives, relevant descriptions of the community and partners to the plan's preparation, available background information, expected products, level of community consultation, working relationship between the committee and the consultant, resources that the committee can contribute to the project, start and completion dates, and available budget. Terms of Reference are key to ensuring that the committee can make meaningful comparisons and identify the best proposal. They are also a helpful tool for in-house activities, assisting the committee and/or project manager to stay on track, identify and get agreement on tasks, and generally make the project more manageable.

A Terms of Reference is generally written in a series of sections. While the extent and complexity of the Terms of Reference will depend on the scope of the project, the points below correspond to the sections and content that are typically found in these requests for proposals.

Introduction

Why do you want to prepare the plan? What are you hoping to achieve?
A brief overview of the goal of the plan, and the history, issues, current situation, trends, etc. that have led to its preparation. Presumably, the plan's over-riding goal will be to increase the level of physical activity in your community by the year 2010. The context or motivation for the goal, however, may be unique in your community.

Community/Project Profile

What is your community like? What makes it different from other communities?
A brief description of the community and/or project as background to preparing the proposal for the plan. This shouldn't be too extensive. The consultant needs to know such things as (not all of the points that follow are relevant to every project):

> Socio-demographic profile (e.g., a growing community, a retirement community, higher than average number of young families, commuter suburb);
> Is there something that would significantly affect opportunities for physical activity over the next 5 years (e.g., the construction of a new recreation centre)

- Location – general, geographic, major features e.g., on the north shore of Lake X, etc.;
- Agencies involved in providing opportunities for physical activity and their working relationships; and
- Geographic considerations (e.g., urban area dependent on facility-based activity; high level of access to natural environments that support physical activity).

OBJECTIVES

- to describe current physical activity patterns and health indicators in your community
- to describe characteristics of the residents that may influence the plan
- to identify other community characteristics that may be important in the planning process

Objectives

What specific things do you want to achieve?
Clearly listed, easy-to-read points. The more specific you can be the better, as indicated in the following examples:

- To identify the reasons for inactivity among community residents;
- To develop a Mission statement, goals, objectives and short-term targets for the activity plan;
- To assess the effectiveness of current communication and marketing activities in motivating residents to be more active;
- To improve coordination among community agencies responsible for improved community health and fitness;
- To identify current "policy barriers" to increased physical activity among residents.

Try to limit your objectives to key items. Objectives such as "involving the community in the planning process" are really procedures or tools, and can be covered in the workplan section.

Information Available

What relevant information or resources are already available?
Lists background studies, reports, available statistics, etc. If there is existing information that you can provide, thereby limiting the work required of the consultant, you should note this (e.g., an up-to-date population and demographic profile of the community). If the community is prepared to undertake some of the work in preparing the plan (e.g., collecting and documenting health/activity statistics under the direction of the consultant), this should be indicated. The use of available resources and information saves consulting time (and therefore budget) for other activities. If the consultant knows this before preparing the proposal they will be better able to ensure no duplication of effort in proposing work that has already been done, or can be done by the community.

Approach to Preparing the Plan/Work Program

How is the work to be carried out?
Describes any specific requirements you want included in the consultant's work program (proposal). Try to strike a balance between telling the consultant exactly how to do the work (and therefore eliminating any possibility for the consultant to demonstrate creativity by proposing an approach), and providing sufficient

direction to ensure the consultant meets your minimum expectations.

Emphasize study requirements that are, in your view, essential in your community (e.g., specifying minimum requirements for community consultation; identifying necessary products such as guidelines on developing a social marketing program, evaluation mechanisms to measure changes in activity levels over time; identifying that a certain level of statistical significance is necessary in a survey, etc). You might briefly outline the anticipated stages in the study process and preferred methods of analyses.

If it is important to the process, and to an understanding of the scope of the study, you might want to identify:

> Number/type of groups to be contacted (the more specific you can be the better e.g., there are 60 community recreation groups; 5 neighbourhood committees; staff from 3 public agencies - the municipality, public health, school boards; staff from the YMCA; 2 private fitness clubs);
> Interest in a community survey, number of public meetings, number of meetings with the committee, etc.;
> Timetable for work to occur (e.g., surveying, meetings to occur over a specific season, a whole year, or another schedule)
> Number of copies of draft and final reports;
> Any special considerations that must be addressed by the plan.

Terms of Reference usually ask that proposals outline, at minimum, the qualifications and experience of the study team and key personnel who will work on the project, the work program, schedule, budget and references. Consultants should list only projects done by members of the consulting team in the proposal (not projects that might have been done by the firm but not by the consultants who will work on your plan).

Roles and Responsibilities

Outlines the roles and responsibilities of all those involved in managing the plan's preparation including the project committee, committee chair, project manager, consultant, etc.

Report Procedures

Outlines expectations for reporting such as points at which reports are submitted to the committee, report format and organization, number of copies, provision of originals for copying, copy of questionnaire, original survey data, etc.

Budget

Outlines resources available for the project. A complete list of items the consultant must include in the proposed study budget should be listed (e.g., do you want per diems, days or hours of effort, a lump sum for expenses or detailed expenses, is GST to be included or not?)

Ensure the budget is consistent with the anticipated work plan. Although Terms of Reference often do not include budget information, it is really in your best interest to do so. If the scope of work is not clear, and there is no budget, it is very difficult to prepare a realistic proposal. When clients don't provide consultants with a study budget, it is usually because they feel that all bidding consultants will submit a budget within the range of the stated amount. If the available budget is in line with the expected level of effort, this should be expected and a potential overpayment for services should not be a concern. On the other hand, it isn't unusual for Terms of Reference to be well beyond the scope of the available budget, and by not providing the budget you may get proposals that are well beyond your means. It is not uncommon for consultants to be asked by prospective clients how much a particular study will cost. Most consultants will give you a ballpark figure based on your description of the project.

Proposal Submission Requirements

Lists any specific requirements for submitting the proposal:

> How many references should be provided (3 is the norm);
> How many copies of the proposal should be submitted;
> When is it due - allow sufficient time to prepare the proposal (3 weeks is realistic);
> Where is it to be sent, and to whose attention;
> Who do consultants contact with questions;
> Will there be an interview of short listed candidates and, if so, when;
> When/how will a consultant be selected.

RESOURCES:

> Literature Review:
FACTORS AFFECTING THE SUCCESS OF PROGRAM INTERVENTIONS

LITERATURE REVIEW: FACTORS AFFECTING THE SUCCESS OF PROGRAM INTERVENTIONS

There are a number of articles in the professional and academic literature that evaluate the success of various interventions in promoting physical activity. Selected sources are listed in the next section of the resource manual (Bibliography and Websites for Further Information). For those interested, there is a considerable amount of research available.

The following briefly described a number of interventions and what is known concerning their effectiveness. In addition, we have briefly commented on implementation considerations affecting each of these interventions. The review of effectiveness is largely taken from an article published in the American Journal of Preventive Medicine ("The Effectiveness of Interventions to Increase Physical Activity: A systematic Review" – see bibliography for full reference).

The following interventions are described in the following tables:

> Point of Decision Prompts
> Class-room Based Health Education
> Mass Media Campaigns
> Enhance School based Physical Activity
> Enhanced Access to Physical Activity Facilities and Information Outreach
> Community Wide Campaigns

Summary of *The Effectiveness of Interventions to Increase Physical Activity*[2]

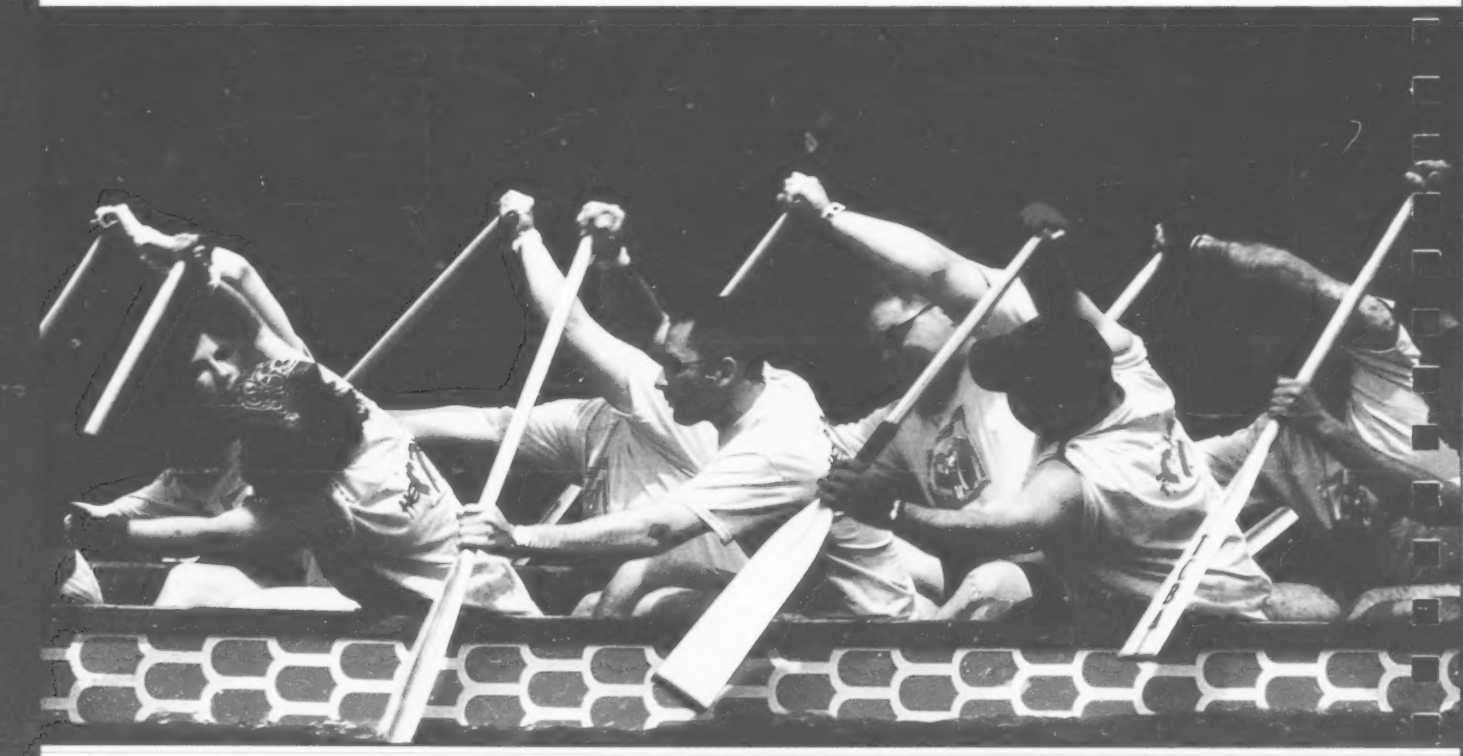
Intervention	**Point-of-Decision Prompts**
Examples	Posting signs to use stairs instead of escalators/elevators
Effectiveness	effective in increasing stair use, particularly when potential benefits to specific populations (e.g., weight loss for obese people) are also posted
Implementation Considerations	
resource commitment	> low
activation time-frame	> short: one-time installation of signs
adaptability/ flexibility	> potentially suitable/attractive to all sectors of the community (e.g., public, non-profit, private) > supports independent implementation among participating agencies
population coverage	broad-based
monitoring	difficult to systematically monitor on an ongoing basis; periodic hand-counts required

[2] Kahn, E.B. et al. *American Journal of Preventative Medicine*. Elsevier Science Inc. 2002: 22 (4s)

Intervention	**Classroom-Based Health Education**
Examples	> classes that provide information and help develop decision-making skills in a variety of health-related areas (e.g., physical activity, nutrition, smoking, drugs etc.) > designed to effect behaviour change and responsible personal decision-making
Effectiveness	> effective in increasing knowledge about health and the benefits of physical activity > insufficient evidence regarding the effectiveness of the intervention in increasing levels of physical activity
Implementation Considerations	
resource commitment	> part of prescribed health education curricula
activation time-frame	> ongoing during academic year
adaptability/ flexibility	> may be tailored to individual audiences
population coverage	> elementary, middle and high school populations
monitoring	> difficult to monitor the effect of increased knowledge on behaviour

Intervention	**Mass Media Campaigns**
Examples	> messages delivered to community-at-large through mass media using a variety of communication techniques > designed to increase knowledge, influence attitudes/beliefs, change behaviour
Effectiveness	> Inconclusive evidence on effectiveness
Implementation Considerations	
resource commitment	> generally high resource requirements; may be offset, by sponsorship or donated time
activation time-frame	> ongoing
adaptability/ flexibility	> limited due to requirements for a set campaign with fixed media pieces
population coverage	> very high; depending on media
monitoring	> difficult to attribute effects to media campaign

Intervention	Enhanced School-Based Physical Education
Examples	> modified curricula to increase the amount of time students are moderately or vigorously active through: increasing the number of PE classes; lengthening duration of existing PE classes; increasing activity levels during existing PE classes
Effectiveness	> effective in increasing physical activity levels and improving fitness; supported by strong evidence > effective across different racial, ethnic and socio-economic groups, among boys and girls, elementary and high school students, and in urban and rural communities
Implementation Considerations	
resource commitment	> low; if done through educational authorities
activation time-frame	> short to medium: depends on time required to revise curricula and implement changes
adaptability/ flexibility	> determined by parameters of prescribed curricula; could be designed to meet the needs of a variety of interests and abilities among student populations
population coverage	> elementary, middle and high school populations
monitoring	> relatively easy to monitor; mechanisms could be incorporated in the program



Intervention	**Create or enhance access to places for physical activity combined with information outreach activities**
Examples	> individual agents such as workplaces, government agencies or communities work together to increase access to places and facilities for physical activity > incorporate other social support and/or informational components (e.g., training on equipment, health forums and workshops, related service referrals, counseling, buddy systems, health behaviour education, etc.)
Effectiveness	> effective; supported by strong evidence > effective among both men and women and in various settings
Implementation Considerations	
resource commitment	> varies; agency-specific policy change could represent minimal resource commitment; construction of new facilities would likely represent significant resource commitment
activation time-frame	> varies; improving access to existing facilities through policy changes could be accomplished in short-term; building new/improving existing facilities could represent medium/long term projects. > medium to long: extensive planning/coordination, numerous parties involved, sustained/ongoing activities, time required to establish community buy-in, staff training required
adaptability/ flexibility	> can be adapted to specific settings and potential participants
population coverage	> focused on specific populations (e.g., employees in a particular workplace)
monitoring	> easily monitored if based on reporting by affected population

Intervention	**Community-wide Campaigns**
Examples	> highly visible, broad-based, multiple intervention approaches involving many sectors of the community > messages delivered to community-at-large through mass media using a variety of communication techniques > incorporate other social support, facility and/or policy > components (e.g., provide new walking trails, self-help or support groups, physical activity counseling, community events)
Effectiveness	> effective; supported by strong evidence > effective in both urban and rural communities, and among different ethnic and socio-economic groups
Implementation Considerations	
resource commitment	> high
activation time-frame	> medium to long: extensive planning/coordination, numerous parties involved, sustained/ongoing activities, time required to establish community buy-in, staff training required
adaptability/ flexibility	> potentially suitable/attractive to all sectors of the community (e.g., public, non-profit, private) > partnerships required for successful activation
population coverage	> broad-based
monitoring	> difficult to monitor except where program/facility components allow incorporation of formal mechanisms to track changes in activity levels (e.g., periodic hand-counts of trail users, participants at community events, self-reporting, etc.)

RESOURCES:

> Bibliography and Websites for Further Information

BIBLIOGRAPHY AND WEBSITES FOR FURTHER INFORMATION

Resource Manual Examples

Action Schools! BC (Planning Guide for Schools and Teachers)
http://www.actionschoolsbc.ca/Images/Planning%20Guide--%20final%202004.pdf

Healthy People 2010 Toolkit: A Field Guide to Health Planning (2002). Public Health Foundation; Washington, DC
http://www.healthypeople.gov/state/toolkit/ToolkitAll2002.pdf

Developing an Effective Planning Process: A Guide for Local MHC Programs (Family Health Outcomes Project)
http://www.ucsf.edu/fhop/_htm/publications/pg_planGuide.htm

PATCH (Planned Approach to Community Health): Guide for Local Coordinator. US Department of Health and Human Services, Public Health Service; Centers for Disease Control and Prevention; National Center for Chronic Disease Prevention and Health Promotion
http://www.cdc.gov/nccdphp/patch/00binaries/00patch.pdf

Tools of Change: Proven Methods for Promoting Health, Safety and Environmental Citizenship. (1999). Cullbridge Marketing and Communications; Ottawa, Ontario

> Offers specific tools, case studies, and a planning guide for helping people take actions and adopt habits that promote health and/or are more environmentally friendly.

www.toolsofchange.com

District Health Board (DHB) Toolkit: Physical Activity, To increase Physical Activity. (2003). New Zealand Ministry of Health
http://www.newhealth.govt.nz/toolkits/physical/PhysicalActivityToolkit03.pdf

Action Schools! BC evaluation
http://www.healthservices.gov.bc.ca/cpa/publications/actionschoolsreport.pdf

The Community Toolbox – Supports work in community health and development
http://ctb.ku.edu/

Healthy Measures – a toolkit for promoting healthy weights in your community
http://www.healthymeasures.ca/

References and Bibliography

Statistics Canada, Canadian Community Health Survey, 2000/01

Craig, C.L., Cameron, C. (2004). Increasing Physical Activity: Assessing trends from 1998-2003. Ottawa, ON: Canadian Fitness and Lifestyle Research Institute.

Coalition for Active Living. (n.d). Pan-Canadian Physical Activity Strategy. Retrieved from: http://www.activeliving.ca/pdf/PAStrategy%20_Feb%202004.pdf

Guide to Community Preventive Services. (2003). Effective population-level strategies to promote physical activity. Retrieved from: http://www.cdc.gov/nccdphp/dnpa/physical/recommendations.htm

Hillsdon, M., Foster, C., Naidoo, B., & Crombie, H. (2004). The effectiveness of public health interventions for increasing physical activity among adults: a review of reviews, 1st ed. Health Development Agency website: www.hda.nhs.uk/evidence

Kahn et al. (2002). The effectiveness of interventions to increase physical activity: A systematic review. Am J Prev Med 22 (4S).

Matsudo et al. (2003). The Agita Sãu Paulo Program as a model for using physical activity to promote health. Pan Am J Public Health 14(4): 256-272.

Evaluation Resources

Health Canada. Program Evaluation Manual: Key Issues and Strategies for Evaluating Your Workplace Health Promotion Program. Workplace Health System, Health promotion and Programs Branch, Population Health Directorate, Adult Health Division, Health Canada (2003). http://www.hc-sc.gc.ca/hecs-sesc/workplace/pdf/evaluation.PDF

International Physical Activity Questionnaire. http://www.ipaq.ki.se/IPAQ.asp?mnu_sel=DDE&pg_sel

Michigan Department of Community Health & the Governor's Council on Physical Fitness. Promoting Active Communities. Active Community Environments, Govenor's Council on Physical Fitness. Michigan Fitness Foundation. Lansing, MI. http://mihealthtools.org/communities/default.asp?tab=Resources&UseMenu=false#policies

US Department of Health and Human Services. (2002) Physical Activity Evaluation Handbook. Atlanta, GA: US Department of Health and Human Services, Centres for Disease Control and Prevention. http://www.cdc.gov/nccdphp/dnpa/physical/handbook/pdf/handbook.pdf

Existing National Survey Data

2002 Physical Activity Monitor, Increasing physical activity: Assessing trends from 1998–2003.
http://www.cflri.ca/pdf/e/2002pam.pdf

2003 Physical Activity Monitor, Creating effective communication for physical activity trend 1998-2003.
http://www.cflri.ca/pdf/e/2003pam.pdf

Canadian Community Health Survey 2000/01, Statistics Canada.
http://www.statcan.ca/english/concepts/health/

Community Resources – Creating a More Accessible Community

Walkable Communities.
http://www.walkable.org

Active living by design – how to design your community to promote active living.
http://www.activelivingbydesign.org/

Physical Activity Guidelines

A Handy Guide to Physical Activity for a Healthier Heart: Get a Life, Get Active Handbook.
http://www.healthpromotion.ie/pdf/phys.pdf

Canada's Physical Activity Guide
1-888-334-9769. www.paguide.com

Nutrition Guidelines

Canada's Food Guide to Healthy Eating
http://www.hc-sc.gc.ca/hpfb-dgpsa/onpp-bppn/food_guide_rainbow_e.html

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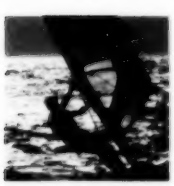
NOTES

ACTIVE2010

Ontario

www.active2010.ca



Ministry of Health Promotion